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ABSTRACT

Transcripts of speeches as well as the Outline of How to Plan a Workshop are included in this proceedings report. It contains the texts of individual presentations by Bay Area Reference Center staff covering the following topics: The Workshop Planners, Assessing Needs, Preparing Workshop Objectives, Defining the Audience, The Time, The Place, The Speaker, and the Budget, How Adults Learn, Presentation Techniques, Selecting Audiovisual Techniques; and Evaluation. Appended is the outline including a list of reference sources, a list defining selected terms and organizations in Continuing Education, sample pre-workshop questionnaire, guidelines for choice of the right room, recommended seating arrangements, and an outline of learning laws, theories and training principles. Also provided are tips for discussion leaders, suggested questions to improve meetings, a chart describing equipment/media relationships, and sample evaluation forms. (KP)

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# WORKSHOP ON HOW TO GIVE WORKSHOPS

# PROCEEDINGS

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The Bay Area Reference Center
presents

A WORKSHOP ON HOW TO GIVE WORKSHOPS

March 24 & 25, 1976
June 16 & 17, 1976
Lurie Room, San Francisco Public Library
Civic Center, Larkin & McAllister Streets
San Francisco, CA

| | |
|---|---|
| 9:00--9:30 | Registration |
| 9:30--9:40 | Welcome - The materials in the workshop kits - The need for continuing education for librarians -- Anne Roughton, Workshop Coordinator, BARC |
| 9:40--9:55 | Introductions |
| 9:55-10:15 | The workshop planners - Assessing needs -- Gilda Turitz, Reference Librarian, BARC |
| 10:15-10:20 | Small group sessions. Each group will pick a topic for a workshop |
| 10:20-10:35 | Preparing objectives -- Audrey Powers, Reference Librarian, BARC |
| 10:35-11:05 | Coffee in BARC's third floor office |
| 11:05-11:30 | Groups will prepare objectives for workshops on the topics they have selected |
| 11:30-11:40 | Defining the audience -- Anne Roughton |
| 11:40-12:30 | Picking a time and place - How to choose speakers - Planning for equipment and materials - The budget -- Gil McNamee, Director, BARC |
| 12:30--2:00 | Lunch |
| 2:00--2:15 | How adults learn -- Audrey Powers |
| 2:15--2:35 | Selecting presentation techniques -- Bonnie Dopp, Reference Librarian, BARC |
| 2:35--2:50 | Using audio visual resources well -- Roberto Esteves, Director, California Video Resources Project |
| 2:50--3:00 | Break |
| 3:00--3:30 | Groups will plan workshops (place, length, presentation techniques) |
| 3:35--3:40 | Follow-up -- Gil McNamee |
| 3:40--4:00 | Evaluation -- Anne Roughton |

## Summary

BARC gave the "Workshop on How to Give Workshops" four times during the spring and summer of 1976; a total of 150 persons attended. The program was presented by members of the BARC staff, and by Roberto Esteves of the California Video Resources Project. Gilda Turitz spoke about the workshop planners and needs assessment; Audrey Powers explained how to prepare objectives for a workshop, and talked about how adults learn. Gil McNamee told how to pick a time, a place, and a speaker; he also explained budgeting. Anne Roughton discussed defining the audience, and evaluating a workshop. A variety of presentation techniques were suggested by Bonnie Jo Dopp; and Roberto Esteves talked about selecting audio-visual techniques. Anne Roughton and Audrey Powers prepared a twenty-three page *Outline of How to Plan a Workshop* (referred to in these proceedings as "the *Outline...*", or "the workbook") which attendees could follow as the day progressed. Interspersed with the short talks mentioned above were periods where the workshop participants worked in groups of eight to ten people. During the course of the day each group chose a topic, prepared objectives, and planned an entire workshop program. These plans were presented to the entire group at the end of the day.

* * *

# THE WORKSHOP PLANNERS

Gilda Turitz

When talking about workshop planners, I'm referring to the people who are responsible for producing the workshop, from the inception of the idea through the end - who's going to be responsible for writing the thank-you notes, paying the bills, etc. The most important thing is that the people who do the workshop have a clear idea of what they're doing, for whom they're doing it, and how to follow through. I think that most people will find that the outline in your green booklet is very helpful when you go through it step by step.

Planners fall into three categories. The first is a decentralized committee, in which members of the organization are spread over a wide geographic area. This is most likely to happen when you're planning a workshop for CLA or for a rural library system. Recently Gil planned a workshop with a decentralized committee. He gave a workshop in Chico on genealogy, and there were people from North State and people at BARC planning it together. It's important in such a situation that you have a coordinator to assign responsibility to each member of the committee, and to make sure that everybody knows precisely what they're to do - for example, one person to prepare kit materials, another to make room arrangements, a third to do publicity, etc. Try to minimize the communications problem, because a decentralized group won't be able to meet very frequently.

You might be working with a second type of planner, a coordinated group, probably in a single library system in which you'll be able to have periodic meetings. Again, it's very important to assign specific responsibilities to people and make sure that a coordinator or a chairperson knows how everything should fall into place.

A lot of you may experience the third situation, that of the individual workshop planner who has to do everything. This person will always need some assistance from other library staff members. Input from others is very important when you're doing a workshop.

For a successful workshop it's crucial that the planners include people who are going to be representative of your target audience or the people you expect to participate in the workshop. Too often a workshop is planned by an individual administrator who doesn't really understand the problem or the prospective audience they're trying to reach in the potential workshop. The individual workshop planner might want to consult other people, such as a subject specialist or a State Library Consultant, other librarians, or even members of the community, particularly when you're doing a workshop on serving a segment of the community, like senior citizens or Spanish-speaking. An example: If you're planning a workshop on serving the Spanish-speaking, you might want to consult some Spanish-speaking users or potential library users, or the State Library Consultant who is concerned with developing service to the Spanish-speaking, or librarians who serve the Spanish-speaking people in other communities. I'd like to re-emphasize that in the planning stages you should include people who are going to be part of your participating audience.

* * *

## ASSESSING NEEDS

Gilda Turitz

When we talk about a workshop, we usually mean a half-day to a one- or two-day training session. Whatever length you choose, you've got to plan it; you can't just wing it. On page 2 of your outline, Anne has put in big, bold letters, "Inadequate planning and preparation result in more program failures than any other single cause."

Your first step in planning is to find out what your needs are: Pick your workshop topic. You can assess needs through simple techniques. One of them is the questionnaire. BARC is going to ask you to fill one out today on future workshop topics that you would like. That's one way to survey people's interests in workshops. You could interview individual staff members, or you can talk to staff members as a group. You can get a few people together and brainstorm for awhile. Or you can try the technique of problem observation. Just look around the library and see where people are falling down. Is reference service not up to standard? Are books being checked out too slowly? Maybe training is indicated. I say "maybe" because there may be other problems. Or a problem may be defined as a total absence of a type of service. For example, you need a workshop on serving the homebound because your library is just about to initiate it and no one has ever done anything like that, so you need to give people some training so they can do it correctly. For best results, you'll probably want to combine some of the methods--send out a questionnaire on a certain problem and interview people. You also might want to survey professional literature. Sometimes this gives you ideas for workshops in order to keep up staff development.

Your next step is to state the problem. Here I'd like to stress that you should "think small." Don't try to solve all the problems that you find in a one-day workshop. It can't be done. Try to keep your topic narrow and manageable. You'll find that you're much more likely to be successful.

Next you have to define exactly who needs to know exactly what. Within the problems you've got to find the needs. If your problem is slow book check out, then it's possible that the patrons need to be instructed about your circulation system. Or perhaps your staff needs more training in the check out system. Those are two different target groups. If it's only one person who has a problem, then you don't have a workshop topic. That person's needs still have to be dealt with, but a workshop is not the way to do it.

Another example: If you observe the reference staff isn't giving good reference service, this might not be a problem solved by workshop training. It might be an administrative problem, that the head of the department needs more management skills. It might be that you have a scheduling or a poor staffing pattern problem, that you don't have enough people at the peak times. Or it might be, in fact, that the staff does need training with certain types of materials, and that is a possible workshop topic.

Your next step, then, is to separate out your learning needs from your non-learning needs. This is a double check: making sure that your problem stems from a learning need. You continually have to ask yourself, "Is training the solution here?" If the library needs a new form for reserves and ILL's, for example, this is a non-learning need and not something you could give a workshop about. But if your staff needs to learn how to use a new form, you could give a workshop on the proper use of certain forms. You can teach how to organize your work day, or time management, for example; but if the problem stems from the fact that there is too little time for the staff to do certain tasks, that's not a topic that you can give a workshop about. You can plan a workshop about how to use certain types of equipment, such as A/V or video equipment, but if your problem is that the library needs

new equipment, that is not a learning need. If you can identify and define the need as a skill, such as using the telephone effectively in reference service; or knowledge, such as using legal reference books or microforms; or attitudes, such as handling the emotionally disturbed patron, then you have a learning need and a workshop topic.

Once you've picked your topic, defined who needs to know what, and determined that it's a learning need, your next step is to assign priorities, because you'll probably never have enough time and money to do all you need to do. Workshops take a tremendous amount of time, so you have to consider - will the organization or the library give you backing and support; will they give you enough time to do it, and if money is a problem, will you get the money to do it. Don't underestimate these factors.

Another thing to consider is, will you get commitment? Have a number of potential participants expressed interest in your topic, and is your topic timely? Will you want to do a workshop on rare book selection when everybody is talking about the new public library master plan that has a lot of implications on interlibrary loan and reference? There may be a conflict there.

Last, you have to think about whether a workshop is the appropriate way to deal with your topic. This is something you should be keeping in mind all through the needs assessment process. There are other possibilities for training, such as continuous on-the-job training. You might want to involve yourself in an institute which is longer and more intense than a workshop, usually a four- or five-day session. The terminology is somewhat nebulous. We usually refer to a workshop as a one- or two-day session. Anne and Audrey participated in a four-day institute on creating an educational module. I don't know if they could have done that in one or two days. That's a more intense experience involving more commitment from the participants, etc. You might even need a whole course in certain areas. It's unrealistic to expect someone to learn how to program a computer in a one-day workshop, but you could send her/him to school to take a whole course to do it.

There's a lot more to needs assessment than what I've said, and the book by Davis and McCallon, *Planning, Conducting, Evaluating Workshops*, is really excellent for needs assessment. It discusses learning and non-learning needs in detail. The WICHE document, Barbara Conroy's *Staff Development and Continuing Education Programs for Library Resources*, is also very good on needs assessment. It's more specific for libraries. Davis and McCallon is more general, but it's specifically geared to needs assessments for workshops. So I would encourage you, if you have more questions about needs assessment, to read further.

* * *

# PREPARING WORKSHOP OBJECTIVES

Audrey Powers

My topic is objectives: what they are; how to write good ones; why do them. After this brief introduction you will practice writing some. Page 5 lists helpful sources for choosing and writing objectives. Mager is the always cited classic, but is in the field of education and not in most public libraries. However, it's excerpted in most other sources.

Some of the terminology relating to objectives is educational jargon because the literature is primarily in the education field. Educators have been under more pressure for a longer period of time than have libraries, to be ACCOUNTABLE. Objectives help define what you are doing and help demonstrate worth.

OBJECTIVES ARE OFTEN CONFUSED WITH GOALS. Page 5 of your *Outline...* lists some characteristics of each. Goals are long range, timeless, broad in scope. They are umbrella statements, or POLICY statements that give direction to your programs. They are NOT MEASURABLE. An example of a goal might be, "TO UNDERSTAND THE LIBRARY'S CIRCULATION SYSTEM."

In contrast, OBJECTIVES describe a specific outcome of behavior, are measurable, and are attainable within a given time frame. They flow from a needs statement, and must be in accord with the goals of the organization. They should be important for getting the work done, not trivial. For example, a task such as checking out a book, which might seem trivial, is an important and necessary task.

To avoid misunderstanding, objectives should be clear, concise, and specific. They should be stated in behavioral or performance terms, describing what the participants will be doing when demonstrating achievement of the objective. Thus, concrete action verbs should be used - verbs like write, choose, identify, list, explain, compare, contrast. And verbs should be avoided if they are vague or describe actions that cannot be observed - verbs like to know, understand, learn, appreciate, grasp the significance of, analyze, develop.

Objectives should be measurable, i.e., an observer should be able to clearly see when the objective has been fulfilled. The evaluation standard used to appraise performance should be stated. This might include a test, but visible completion of a task is OK.

Objectives should include a time frame which indicates how long the training takes. They should also be realistic, feasible, attainable and controllable. The opportunity for fulfilling the objective should be reasonably within the control of the person running the workshop and of those attending.

The above statements are guidelines and should provide a framework; they may not all apply to your particular situation. Don't be slavish to the list, but do use what is appropriate. Also, it is important to THINK SMALL; it's better to have a number of clear objectives than one fuzzy complex one.

Let's go back to the goal stated earlier: "To understand the library's circulation system." An example of an objective to accompany this goal: "AT THE END OF THE ONE-DAY TRAINING PROGRAM, THE LEARNER WILL BE ABLE TO LIST AND PERFORM THE 10 STEPS INVOLVED IN CHECKING OUT A BOOK."

Keep in mind that most of these guidelines relate to the CONTENT of the material you are presenting. They don't concern the affective aspect (such as jazzing people up). The affective relates more to your choice of speakers, method of presentation, and so on.

Ruth Warncke's chapter on goals and objectives talks about goals and objectives in human and institutional terms. For companies, the goals and objectives tend to be expressed in institutional terms. But agencies that exist for the welfare of people (such as public libraries) should express their goals and objectives in human terms. Warncke also feels strongly that a workshop is a short-term activity and can deal ONLY with objectives.

You have already picked your workshop topic. In your working session try to state one or more specific, important objectives for your workshop. Specify the kind of behavior that will be accepted as evidence that the participant has achieved the objective. Because of the limited time in this workshop, you need not refine this further, but in planning for a real workshop, you might define the desired behavior further by describing the important conditions under which the behavior will be expected to occur. For example, "Given a list of 10 reference books, the participant will be able to choose the one that best answers a particular type of question." You might also specify criteria of acceptable performance by describing HOW WELL the participant must perform to be considered acceptable: a) IN TERMS OF TIME LIMIT, "With a time limit of 5 minutes, the participant will be able to answer any question concerning departmental resources...", or b) IN TERMS OF PER CENT OR PROPORTION OF CORRECT ANSWERS, "With an accuracy rate of 90%, the participant will be able to..." Finally, then, check out your objective(s) according to the other qualities on the list in the *Outline*...

WHY WRITE OBJECTIVES? Writing them:

1. Provides an exercise in CLEAR THINKING & enables you to ORGANIZE your thoughts.
2. Aids in COMMUNICATING YOUR INTENT.
3. Enables you to CHECK OUT YOUR ASSUMPTIONS.
4. Assures that there is an UNDERSTANDING of and a working toward the goal, on the part of ALL who are involved in the process, not just the person giving the presentation.
5. Gives a sound basis for SELECTING appropriate materials & methods of presentation.
6. Enables EVALUATION of what you have presented.
7. Enables EVALUATION of whether learning has taken place.
8. Enables participants to evaluate their own progress during the instructional process & organize their activities accordingly. In other words, it provides FEEDBACK.

SOURCES

Conroy, Barbara. *Staff Development and Continuing Education Programs for Library Personnel: Guidelines and Criteria.* Boulder, CO, WICHE, Jan. 1974, p.7-8.

Davis, Larry and Earl McCallon. *Planning, Conducting and Evaluating Workshops.* Austin, TX, Learning Concepts, 1975. Ch. 2, "Specifying Learning Objectives."

Kepner, Tom and Lanny Sparks. "Writing Objectives: What you always wanted to know about performance objectives but were afraid to ask." National Special Media Institutes, 1972. Available from Don Ely, Center for the Study of Information and Education, 130 Huntington Hall, Syracuse Univ., Syracuse, NY.

Mager, Robert F. *Preparing Instructional Objectives.* Palo Alto, CA, Fearon Pub., 1962. (Copy not available through BARC; not owned by SFPL)

Monroe, Bruce and James B. Quinn. "Planning for Instruction with Meaningful Objectives," p.37-52, in *Materials & Methods in Adult Education.* Chester Klevins, ed. N.Y., Los Angeles, Klevens Pubns., 1972.

Sheldon, Brooke. "A Proposal Primer," in *Bowker Annual*, 1975, p.147-153.

Warncke, Ruth. *Planning Library Workshops and Institutes.* (Public Library Reporter; No. 17) Chicago, American Library Association, 1976. Ch. 4, "Objectives."

* * *

## DEFINING THE AUDIENCE

Anne Roughton

You've assessed the needs of your library; you've chosen the topic; and you've written objectives. Now you announce the workshop. Try to have people preregistered at least one month before the workshop. If you do this you will have time to define your audience.

You need to know who is coming to the workshop; what they know; what they don't know; and what they expect from the workshop. You have already written your objectives, but you may have to rewrite them. You may find that everyone already knows certain things and those things won't have to be covered. You may find that certain things you assumed everyone knew about, they don't know about--and those will have to be covered. Objectives should be flexible; they may change from day to day.

At this point I want to emphasize something I have learned from experience. You will read it in books, but I learned it the hard way. When you're giving a workshop, don't mix your audience. In other words, try to give your workshop for a group of people who have the same basic level of knowledge about a subject. This workshop today was planned for people who have had little or no experience giving workshops. We set our objectives accordingly. You will give better and more successful workshops if you do this too. When you mix people who have a great deal of knowledge about a subject with people who have no knowledge of the same subject, you end up giving a program that's not very meaningful to anyone.

To define your audience, you can send out a written questionnaire, which is what we did before this workshop [see Appendix #3]. Everyone participating today in giving this program has carefully read over your answers in the returned questionnaires; they will try to respond to the needs you expressed and questions you raised. I find one gets a very positive reaction when this type of questionnaire is sent out. People are eager to tell you what they want; so don't be shy about doing it.

You can send out a simpler kind of questionnaire than we did, a short one. If you're going to give a workshop on business reference, perhaps all you need to do is ask the staff which particular business reference books they would like talked about.

Another way you can define your audience is to meet as a group a few weeks before the workshop with the people who are coming to the program. Ask them what they would like to learn at the workshop. I did this with a group from San Francisco Public Library about one month before this workshop. We set a time limit of one hour, and we just brainstormed. This pinpointed certain specific areas that needed covering during today's program.

A third way you can communicate ahead of time with the audience is to get on the telephone and talk to people. If you're dealing with 12 to 15 people, you could easily interview them over the telephone. If you do this, I suggest you prepare a set of perhaps 5 to 10 questions beforehand; this will keep the interview from getting too far off the track.

* * *

## THE TIME, THE PLACE, THE SPEAKER, AND THE BUDGET

Gil McNamee

My part of the workshop is pure "nuts and bolts." What I will say you will say, "I already knew that." However, if not done right, the little things can ruin your workshop, despite how beautiful your objectives are. Most of the material is in your kit. I want, however, to elaborate on a few points.

### The Time

The notes in your workbook (page 8) are obvious about picking a time for the workshop which doesn't conflict with other "like" meetings. Chances are that if you schedule it early enough and announce it, you will have no trouble. We at BARC like to schedule all of our major ones at the beginning of the fiscal year. Sometimes we find the scheduling of the room influences the date, since we like to use the Lurie Room here at the Main Library as much as possible.

The executive director of the California Library Association maintains a master calendar of all library meetings in California, and prints highlights of this calendar in its *Newsletter*. The office, however, should be checked before scheduling, since there may be other meetings not listed in the *Newsletter*.

### The Place

"Pick a Place" in your workbook (page 8), "The Right Room" (Appendix #4), and Ruth Warncke's *Planning Library Workshops and Institutes* listed on the bibliography, should be all that any workshop planner would need in order to assure that the right site is chosen for the particular type of workshop you are giving. The Lurie Room is slowly becoming a very good meeting room, although it has not always been. We have used others - the Nourse Auditorium when we had Berkeley's new mediamobile on stage. One of the most effective uses of an outside site was at UC Hospital when we gave a workshop on medical reference. We have a list of meeting rooms in San Francisco, their seating capacity and rental rates. Our list is available from the Convention Center. Most Chambers of Commerce have such a list, and it would be wise to obtain one for your city

"The Right Room" is designed as a checksheet for the workshop planner to take along to the site. I will not go over each one of these points, but I would like to make comments about some of them. This list states that one must see the room ahead of time. I can't stress this too much.

Picture this, if you will: A room for the workshop on the 44th floor in downtown San Francisco. It has windows that overlook the bay and the financial district. Mirrors on the other side reflect this lovely skyline. Doesn't that sound beautiful? But the thing you don't know until you arrive is that there are columns right down the center of the room, making it impossible to be used as a meeting room of any sort. This is what the Public Relations Committee faced last year at the CLA Conference at the Hilton.

Particularly, then, if the workshop will be held at a site other than one you know well, be sure and check it first. I attended a workshop at a motel in Long Beach. The workshop was one designed for many table discussions. It was held in an inside dining room - no ventilation, and so dark that it was impossible to take any notes at all. Beautiful for intimate dining; not so for workshops. At least they should have furnished candles! Obviously the planners had not seen the room, or the hotel management had given them a different location from the one they had selected. This can happen also.

Looking down the list to item 5, movable chairs. This is particularly important if you have planned discussion groups and buzz sessions. This is impossible to do in most auditoriums. I have also attached in the appendices some examples

of seating arrangements [Appendix #5]. Please avoid theater or auditorium style if at all possible. There are so many other arrangements; be brave and try them. Also you will note that I have left room for you to develop your own style.

I like a raised platform and a lectern; however, some feel that these constitute a barrier between the attendees and the speaker(s). I don't feel this way, however. I think it's important for the speaker to be seen as well as heard.

Smoking versus non-smoking is a big problem now, and it's up to the workshop planner to take care of this without discriminating against either.

Item 27 lists several items that should be available and that have to be transported to the site if it is held outside the library. I listed both chalk and eraser. The latter seems obvious; however, I was very embarrassed once when one of my speakers had to use his handkerchief to erase the blackboard!

Remember, this list is to be used as a checklist. Do take it with you when you look at a new site.

The Speaker

The workbook is good on this subject, and suggests some places where speakers can be obtained. It should be made clear from the start that many speakers can be obtained free. There are many people who are anxious to speak, love to speak, and are just waiting for someone to ask them, and generally won't ask for a fee. It's finding them that can be difficult; however, remember you're in California, and you have the wealth of major universities and colleges, the headquarters of many associations, writers, poets, musicians, actors, and a great many people with all kinds of talent who have elected to make California their home.

First of all, you should start with the staff - is one of them knowledgeable and can speak on the subject? - perhaps a library trustee? You can always look to your coordinators, or the public relations person in your library. They, in many cases, keep files of names. I consider the Adult Coordinator here at San Francisco Public as the Sol Hurok of the library. She has scores of names of people for programs. Her office keeps a critique file of them, filed by subject. Librarians sponsoring the programs will send in evaluations of the performance. You may wish to contact her office for suggestions.

The Friends of the Library here at SFPL are endeavoring to build up a "Speakers' Bank" on library matters. Your State Library has knowledgeable people. They also can suggest others. Colleges and universities can help. The names of subject experts can be found in newspaper articles, in magazines, from associations, community groups, from local and state government agencies.

BARC has found that buzz sessions with the staff are very profitable. Names of many knowledgeable people are in our Information File.

It might be interesting to you to review some of our workshops, the speakers, and where we found them:

1. Art (A local artist; two museum curators, a collector and the *Chronicle* critic).
2. Modern Poetry (Poetry Center at San Francisco State College).
3. Meeting the Needs of the Spanish-speaking (Latin-American Library; Dept. of Spanish, Stanford; Mexican American Community Services Agency, San Jose).
4. Religion (Ministers, rabbis, priests; Northern California Council of Churches; BARC staff; the Satanist Church).
5. Natural World of the Bay Area (Division of Mines & Geology; Corps of Engineers; the zoo; Academy of Sciences; Morrison Planetarium; Harold Gilliam).
6. Genealogy (California Genealogical Society; Church of the Latter Day Saints).
7. Legal Reference (the State Library).
8. Intellectual Freedom (State Library; George Moscone; librarians who have had actual problems).
9. The Older Adult and the Library (California Legislative Council for Older Americans; Administration on Aging; Self-help for the Aging; National Council on Aging).

10. The Performing Arts (A.C.T.; the Art Commission; Archives of Recorded Sound, Stanford; the Renaissance Faire; the Mime Troupe).

You get used to collecting names for the future. I have been pointing out suggestions to Anne for future speakers on local history and publicity.

A speaker can make or break your workshop. The speaker has to have the merchandise and has to have the ability to deliver the merchandise. Regarding a person with subject expertise, don't make him or her speak if they don't want to. This applies particularly to library staff members. I made that error once and it was disastrous. Try to find someone who has heard the speaker. Was he or she nervous? Did he or she speak too fast? Was the top of the head all you saw? Was the speech read? How did they field the questions from the audience? Find out if the speaker is invited again and again to speak. If so, they are probably good.

The decision for a speaker should be done at least two months before the workshop, or better yet, three months. Your workbook tells you what to say in the first letter or phone call.

Keep in touch with the speaker during the time between the acceptance and the day of the workshop. Send the speaker copies of your flyers, your announcement, the final agenda, and follow up with a second letter or telephone call, since there is other information which you should ascertain in addition to those items in the workbook:

1. Does the speaker mind being taped - audio or video?
2. Is the speaker more comfortable speaking standing up or sitting?
3. Will a lectern be required?
4. Will there be a need for extra equipment - slide projectors, blackboard, overhead projector, etc.? Does the speaker need help turning the flip chart?
5. Will the speaker bring material to give to workshop participants?
6. Will you invite the speaker's spouse to attend?

And on that day when he or she arrives, if it's early enough, show the speaker the room; perhaps there'll be time to make any changes the speaker would like. Review with the speaker how the workshop is going - has anything happened that might affect your speaker's presentation?

Treat them as you would a very important guest in your house. If you can't go to lunch with the speaker, assign someone who will. And see that the rest of the stay is pleasant and that they arrive back to the airport or wherever on time. Make it clear that if the speakers would rather be on their own - abide by it. Treat them the way you would like to be treated.

The Budget

First of all, workshops are expensive. This, in many ways, is probably the principal reason there is not too much in the way of staff training available. Your workbook gives you a breakdown of items that have to be paid for. The most expensive item, as you know, is for the salaries of those who plan and conduct the workshop.

I'd like to make some additional comments if the workshop is held at a motel or hotel. Some of them provide free chalkboards, easels, screens, lecterns, sound equipment, etc. This would cut down on rental fees. Some of them give reduced rates for meeting rooms if there are so many sleeping rooms used by the group, or if there are to be meal meetings scheduled. Little items, such as coffee or tea, can run as high as 75¢ per cup. Also, there will be an added expense for security (guards or watchmen) if these are needed for exhibits, etc.

As to costs: BARC estimated in 1968 that each workshop cost somewhere in the vicinity of $4000. A 1972 survey of costs included planning, execution, staff participation, and administrative overhead; the cost per workshop was $7500.

The "Workshop on Workshops" cost about $2200. This is probably a low estimate, but remember, it involves only BARC's staff. This workshop, if registration fees were charged, would be almost $37.00 each. If your workshop is planned well enough and is successful, you can present it again and again. This brings the costs down, and registration fees are lower naturally.

BARC's workshops, on the whole, are more reasonable, however, than some in the library field. WICHE's workshops even to those who are member states are very expensive. Its 2 1/2-day "Interpersonal Commmnications Workshop" cost $1350 for a member state, and $1900 for nonmember states. (And it is not yours to repeat when finished.)

The National Training Laboratory's institutes generally held for 5 days are $400 per person, tuition and registration, and an additional $250 for room and meals.

There are many associations and libraries whose policies are that every workshop should be self-supporting, so workshop coordinators should consider registration fees.

If there just aren't any funds for staff training, a coordinator could try alternative ways of getting money:

1. Friends of the Library donation.
2. A grant.
3. The State Library.

or ask for contributions for:

1. A free meeting place.
2. Free printing.
3. Publishers sometimes donate items or pick up the cost of a bus or something.

In closing, I refer again to Ruth Warncke's *Planning Library Workshops and Institutes*, particularly the Appendices. They are particularly good for the physical planning of a workshop.

* * *

# HOW ADULTS LEARN

Audrey Powers

Since workshops are a type of teaching, some background on learning theory and process might be helpful. This brief introduction will summarize some theories of learning, some differences between learning in adults and in children, and some learning laws. There is a tremendous amount of literature in the field. From your bibliography, M. Knowles is the classic, and *How Adults Learn* and the H.E.W. andragogy book are both good. Andragogy, by the way, is a high falutin' word for adult education. It is popular in Europe, but never caught on in the U.S. It's on your term list along with adult education and learning.

As background, there are many different learning theories, probably as many as there have been learning theorists, who all like to create their own theory. But there are three basic types: behavioral (B.F. Skinner's classical stimulus/response conditioning); cognitive (Piaget and Jerome Bruner's theories of stages of readiness to learn different types of material); humanistic (which emphasizes the individual's needs, and is represented by Carl Roger, Abraham Maslow and Fritz Perls).

An interesting attempt at creating a general theory of learning has been formulated by Prof. Josephine Flaherty: "Learning results in a relatively permanent change of behavior, that it takes place within the context of experience, and that ease or rate of learning depends on the ease with which new information is integrated by the learner" (quoted in Kidd). Most learning theorists would agree with this statement.

I would like to mention briefly an interesting learning theory development, involving the differences between the two halves of the brain. See Robert Ornstein's book, *The Psychology of Consciousness*, for further information. Neurologists now realize that humans have two separate brains, the left hemisphere or left brain, and the right hemisphere, or right brain. We think with both, and different types of mental activities are concentrated in each half.

The left brain controls the right side of the body. If one is right-handed, this is the dominant side. In our verbal, linear society the left is dominant; at least most thinking people over 25 are predominantly left-brained. It operates sequentially, in a linear manner. In it are concentrated verbal functions, analytic processes, logical thinking, and math functions. Words and numbers are its forte.

The right brain controls the left side of the body. It thinks creatively, intuitively, holistically, processing diverse input simultaneously. In it are concentrated artistic expression, music, dance, one's image of one's body, the ability to recognize faces, and the controls for one's orientation in space. It utilizes spatial relationships and forms. Television, video, and all other visual presentations appeal primarily to the right brain.

Psychologists have found that learning is more effective if both halves of the brain are used. Students who have problems learning to read or do math will do both better if they are also taught music, art or dance. This has implications for different types of teaching and presentation techniques, as you will see during Bonnie's presentation this afternoon. If your training can make use of the creative, relational right brain, as well as the verbal, analytical left brain, you are more likely to have learning occur.

Adults and children have differences in perception and feelings which they bring to the learning experience; these have implications for learning. Many people new to teaching and workshop presentations (a form of teaching) assume adults should be taught as are children, and their prototype is the traditional pedagogical teacher. Learning theorists today feel that children should be treated like adults in the learning process, but for the sake of familiarity, I'm contrasting the way most of us were taught, in the traditional dominant teacher, passive learner mode.

The first area of difference is self-concept. Children are, by definition, dependent, not autonomous, not self-sufficient. A definition of an adult might be to be self-directing, to be autonomous. Adults resent having their concept of maturity violated by being treated with lack of respect, being talked down to, or judged. When adults discover that they are capable of self-direction in the learning process, as they are with activities in their own lives, they become more motivated to learn. One of the best things you can do as a workshop organizer, is treat adults as equals, as participants in the learning process. There should be sharing between teacher and learner, rather than the directing, dominant teacher and dependent learner in the traditional classroom situation.

The second area is experience. Children have fewer experiences; adults have a much greater quantity and much wider variety of experience. With children, communication in learning tends to be one way. It's the teacher as authority, presenting knowledge to the student. With adults, two-way communication is possible. The prior experiences and expertise of teacher and learners are resources for current learning. Group discussions, role playing and team designing become possible teaching techniques.

The third area is readiness to learn. When teaching children a skill or technique, for instance algebra, you're building on previous sequential knowledge. Arithmetic must be learned first. But adults have the basic knowledge that is taught, at least in the traditional classroom. Their learning relates more to their immediate concerns, their job, family, life, society. This has implications for grouping. Children tend to be grouped by class or by grade, with the teachers making curriculum decisions. However, adult learners group themselves according to their own interests, and the teacher or facilitator's function is to help diagnose learning needs and serve as a resource person.

A fourth area concerns time perspective and orientation toward learning. Children's education stores knowledge for future use, and teachers are the curators of this knowledge. The child absorbs it, doesn't use it immediately, but saves it for future use. With adults, problem centered education is more effective than subject centered, and grouping for learning tends to be in terms of teams that concern themselves with finding, analyzing and solving real problems.

A fifth area, correctness of answer, is quite complicated. For adults, in decision making there are few easy correct answers. In one's life, business, politics, there is seldom a right answer or action. With a child, in the learning process, there are facts, and they are related by the teacher and found in the textbooks. But with adults, decisions are more complicated in terms of right versus wrong. There's a corollary problem for adults because they often have a measure of "correctness" associated with tradition, philosophy or religious upbringing. Perhaps no answer would pass rigorous tests, but some might be more correct in terms of their personal background. Think about how often one hears the statement, "But that's the way we've always done it." This can present blocks for the teacher.

A sixth area concerns effects. Decisions made by adults almost always have an effect on other people, and can involve a tremendous amount of responsibility. Most learning for children is in a potentially less serious and less threatening environment. Not learning may mean a bad grade or a spanking; learning may mean a good grade and a monetary reward. However, this is not the same kind of serious effect that is implied in the decision making adults do. In this area, adult education can provide a practice environment to talk about problems, try out with possible solutions, engage in some role playing, all in preparation for decision making in the real world.

In the area of expectations, a child expects to learn what the teacher has to teach, and the teacher accepts this; but the adult often brings expectations and views different from the teacher's, and conflicts may result. The teacher has to be very flexible, not dogmatic, open to other ideas, and willing to discuss other points of view.

Appendix #6 lists selected Learning Laws and Theories. It summarizes some basic principles that appear in all learning theory texts. The first principle concerns the importance of planning the training. Know what you are dealing with; draw on the interests and needs of your participants. Remember that pleasant things are learned more readily than unpleasant, but both pleasant and unpleasant things are learned much more readily than things which arouse no emotion at all. If you can get your audience involved by stirring up their emotions over an issue that has some real effect on their lives, learning will be more likely.

The second principle involves preparation of the learner. Learning will be more likely if you have stated your objectives, performance standards, applications of the training, and relationship of training to the learners' jobs.

The third point is that learning is active, not passive. Learners remember only 10% of what they read, but 30% of what they see, 70% of what they say, and 90% of what they say as they do something. This relates back to the two halves of the brain and using learning in both halves. It has implications for use of A/V and other presentation techniques. If you are trying to teach use of a computer terminal or video equipment, the learners must handle the actual equipment, not just listen to someone talk about it. Because of time constraints, I have used the lecture, which is not a good presentation technique, but I have supplemented my presentation with some visual aids, the sheet on learning laws and the poster. Hopefully that will increase your remembering.

Point four is that the trainee needs time to absorb, accept and practice applying the new learning. Allow time within the workshop for practice, and make sure that as a follow-up there are opportunities for practice on the job.

Point five: Knowledge of the results of practice increases learning. Build in feedback devices. Remember, positive feedback produces learning more readily than negative, but both positive and negative produce more learning than no feedback at all.

One final point, from *How Adults Learn*: Adults will take part in educational activities close at hand more often than those in which they claim they're interested but which are difficult to reach. If you don't make your workshops accessible, your staff won't come, and consequently won't learn.

* * *

## PRESENTATION TECHNIQUES

Bonnie Jo Dopp

There are some general points I want to make on presentation techniques. First of all, it's OK to experiment. You don't have to stick to the things listed in the workbook [page 9]. You don't have to just do things you read about, or those you've already done. If you think of some new way of presenting an idea, consider it carefully. Then, if you feel it might work, go ahead and try it. There's nothing wrong with experimenting, as long as you don't have a whole day of experimental techniques that are unfamiliar to everyone.

My second point is that no one technique is necessarily the best one to use for any one objective you have. Conversely, one objective may be approached from a lot of different angles when you present material. Keep that in mind.

Thirdly, a good workshop has a mix of presentation techniques. You shouldn't subject your workshop participants to one technique all day long, or for two days straight.

Presentation techniques are not chosen in a vacuum. You have a setting for choosing them. This setting includes the topic and objectives of your workshop, the audience, the background and skills of the audience, the time and space you have for the workshop, any props or equipment that might be necessary, the pace you want to set, and also the skills of your staff and of the resource people who will present the information.

With that as an introduction, I'm going to talk about two broad categories of presentation techniques; these line up with what Audrey Powers mentioned this morning about the left and right brain. I'm going to talk about verbal and nonverbal techniques and methods: things that are good for left brain learning, and things that are good for right brain learning.

One of the best verbal presentation techniques is print. One of the best items in this workshop is the kit material you have. You will take it home, read it, and have something you can follow along with. You can ask your participants to read something before the workshop, something that will be discussed during a presentation. You can also give them something to read during or after the workshop.

When we think of workshops, we usually think of oral-verbal techniques: speeches. Words can be used to do a lot of different things: to inform people, to persuade people, to change their behavior, to provoke people to ask questions or to think about a subject, to summarize what's been going on during the day, to entertain people, or even to inspire them. So speeches in a workshop can be very, very flexible. You can make them do whatever you want them to do; they can help meet many of the objectives of your workshop.

The pitfalls of speaking lie mostly with the speaker. If you choose a poor speaker, you may put your audience to sleep. If you're going to have speeches as the major part of your workshop - by major, I mean a 30-minute or longer presentation - be sure you have a speaker you have heard, or someone whose judgement you trust has heard and can recommend. You can make or break a workshop with a speech.

If you ever have to give a speech, plan to spend at least one hour of preparation time for every minute of presentation. This is especially true if you're going to talk on a subject you need to research, one you're not familiar with. If you're going to talk about a topic very familiar to you, you may not have to spend an hour for every minute of speaking. But plan to give yourself and your staff plenty of preparation time when speeches are to be given. This preparation time should be on-the-job time, not at-home time.

If you invite an outside speaker, be sure to give her or him detailed information about the topic and what you expect to achieve in the workshop.

A second kind of verbal presentation is the panel discussion. Traditionally, panel discussions are supposed to provoke people. You have a number of people, each

with a different perspective or viewpoint on a subject, and they talk in reaction to each other. There is a moderator whose role is to keep tempers down and to keep questions flowing, if conversation should break down. One of the rules is to be sure to give your audience time to react; another is to choose speakers who are articulate and informed, people who can keep their tempers, people who can listen to each other. Of course, you want to have a good moderator also. Panels can be very good for stimulating people to think about something.

Panel discussions can be on unresolved issues. For example: "What are we going to do with the CETA employees? We have a certain number of them, and we have to decide how to use them." You could have people from your staff who have different ideas on this subject get together, in a panel discussion, and talk about it. Afterwards, be sure your audience has time to react; they can either carry on discussions in small groups, or they can all react to the speakers. It would be bad politics to provide a stimulating panel and then not let the audience have a chance to have their say on the issue.

You could also have a panel discussion on a controversial issue, something that could be answered yes or no. Should the staff unionize? Should we abolish the General Reference Department?

You can also hold what is known as a symposium. That's what we're doing today. For a symposium you have one topic, but you cut the topic up into discrete subject areas; each speaker talks on one subject area, for perhaps 10 or 15 minutes. You can use staff people very well for this. No one will be burdened with having to give a major speech in the workshop. You will expect the person, who perhaps knows something about the subject, to do a little research, get a speech together, and do a short presentation. Be sure you get people who are willing to speak. Don't force anybody to speak at a workshop. If you do, he or she will be nervous, and will not be as effective as somebody who is enthusiastic about the topic and who also enjoys, and perhaps has some training in, public speaking.

One of the secrets of a good symposium is dividing the topic well. An example I read was: Suppose you give a workshop on "Using Volunteers in the Library." You can divide the topic in a number of ways. One way would be like this: Appropriate Roles for Volunteers; Selecting Volunteers; Training Volunteers; Evaluating the Work of Volunteers. You have four subject areas, each one separate and discrete. Four people could talk about them, and that might work out very well.

You could also divide it like this: Volunteers in the General Reference Dept.; Volunteers in History; Volunteers in the Children's Room; Volunteers in Branches; etc. If you did it that way, there would be a lot of repetition in the symposium. Each speaker would have to talk about Selecting Volunteers, Training Volunteers, and Evaluating the Work of Volunteers; the only unique thing discussed would be the role the volunteer might be playing. So think it through. When you're dividing the topic for a symposium, try to avoid repetition in the speeches.

Of course, as in any spoken presentation, you can use a symposium to inform people, which is basically what we're doing today; or you can use it to provoke questions. You could have a symposium, as you could have a panel discussion, where you ask people to tell what they <u>think</u> about a subject rather than what they <u>know</u> about a subject. Different viewpoints and opinions would be presented rather than different ideas. Just remember, if you want to stimulate your audience, give them time to react and to ask questions of the people who are in the symposium.

Now I'll talk about demonstrations. Demonstrations can be both verbal and visual. If you're going to have a demonstration, be sure everyone in your workshop can see what the demonstrator is doing. I'm sure you've seen this done at county fairs - someone is demonstrating a new vegetable chopper, and there will be a mirror overhead so people can see what's going on down on the table. In BARC workshops we sometimes use TV monitors. This is a good way to use videotape. You can videotape a demonstration and have it simultaneously shown on video monitors; that way everybody in a large audience can see what's happening.

If you want the participants in your workshop to do something they've seen demonstrated, be sure to give them practice time. A caution - if you're going to have, for example, a workshop on how to tell stories effectively to children, you will probably have a demonstration of good storytelling. You may then ask everybody in the audience to tell a story. For this you need a very supportive atmosphere. You must be sure people know and respect and like each other. This works well in a group where fellow workers are at a workshop, or if you've had a long institute and people have gotten to know each other.

Skits are another method of demonstration. They can demonstrate answers to problems - the wrong way and the right way to do something. Skits and role playing are quite different. You can script skits, so you know what the ending is going to be; you can control exactly what points are presented.

Role playing is different. It's more open-ended. You can use it to illustrate points in a lecture or other kinds of presentations. It's very good for illustrating problems in interpersonal relationships. You need to have a good leader, and it's important to have a discussion after the role play to talk about what's taken place. You have to control it. Be sure you assign roles. Don't say to your participants, "Now, you play yourself; someone else will play a horrible person; get up there; we're going to test you to see how you react." That is very unsafe, very unwise. Don't set up role playing as a test situation.

Many people are afraid of role playing, and therefore, avoid using it in workshops. There are at least four workshops being planned today that could use role playing very effectively. In the "Difficult Patron," this situation could be set up: One person plays the role of a person with an alcohol problem who has come into the library; someone else plays the role of a brand new reference librarian, or a person who got up on the wrong side of the bed that morning, or a library guard who has been called to the scene.

Another example, in the "Budget Request" workshop, ask somebody to play the person who will try to convince the mayor that the library needs a lot more money; someone else can play the mayor who's trying to save as much money as possible.

You might use role play to break up a long discussion session. If discussion is dragging and people are getting tired, and one of the most vocal participants is saying, "Something happened to me the other day, and I just really have to talk to you about it," you can say, "Well, how would you like to role play the situation? You play yourself and show us how you reacted; someone else can be the person you had the problem with." This may be a good way to liven up a discussion that's going flat. Go ahead and try it; see what happens. You can always cut it off. You can be spontaneous with using role playing.

The things I've talked about so far have been things where the participants for the most part have been passive, except for those who do the role playing or ask questions. You can get your whole audience working together in a workshop. You might divide the audience into "listening teams" and give each group an assignment before a speech. One group can listen for points they might be able to implement in their library; one can listen for points they think are debatable; one can listen for points needing more research. Afterwards they all caucus and each group comes up with a question. This is kind of gimmicky, but it's one way to get people talking after a speech.

You can have a very large group, seated theater-style, count off by threes or fours. They then face each other to create groups of 6 or 8 people. Tell them to formulate a question, or make a statement for or against what the speaker said. That way, if you have a very large group, and there are going to be lots of questions, but not much time, you can get people talking; one person in each of the groups can ask the question. You will have at least achieved the goal of having everybody talking and participating.

You can have the kinds of group discussions that we're having today. Have short buzz sessions and/or longer discussion periods. If you're trying to have the

workshop produce something, a discussion group can be used very effectively. Today you're producing a plan for a workshop.

Discussion groups can solve problems. You can use brainstorming techniques. You can analyze a problem. I suggest you read "Tips for Discussion Leaders" [Appendix #7]. It will be helpful if you're going to choose a discussion leader, or if you're going to be the discussion leader of a group and want to practice beforehand. For BARC's "Reference Potpourri" workshop last fall we picked the discussion leaders before the workshop and went over some of these points with them. Today, each group chose its own facilitator. Both methods have been successful.

To get the whole group moving, have resource people seated at different tables during an afternoon session; then have the workshop participants move from table to table, talking and asking them questions. If you're demonstrating something, and have enough equipment, set up different kinds of equipment at each table, and have people practice using it. You could also have the resource people moving from table to table, if that is easier.

We librarians apparently don't feel too comfortable working with right brain techniques. So far I've only talked about verbal presentation techniques. Music, visual aids, video and films are all very appealing to the right hemisphere. I recommend the article in the *Saturday Review* of May 31, 1975, "The Intellectual in Video Land." It explains why we feel guilty when we watch television. Part of the reason is we don't realize we're thinking in images. A lot of us are very print oriented, and when we think, we think in words; we don't often think in images. There are always going to be people at your workshop who think more easily in pictures than they do in words - even though not all of us do it easily. If there are members of the public, or perhaps nonprofessionals or volunteers, at your workshop, you're likely to run into people who find it comfortable to think in images. It would be a good idea to try to provide some visual stimulation for them, something that will help symbolize what's been going on all day at the workshop.

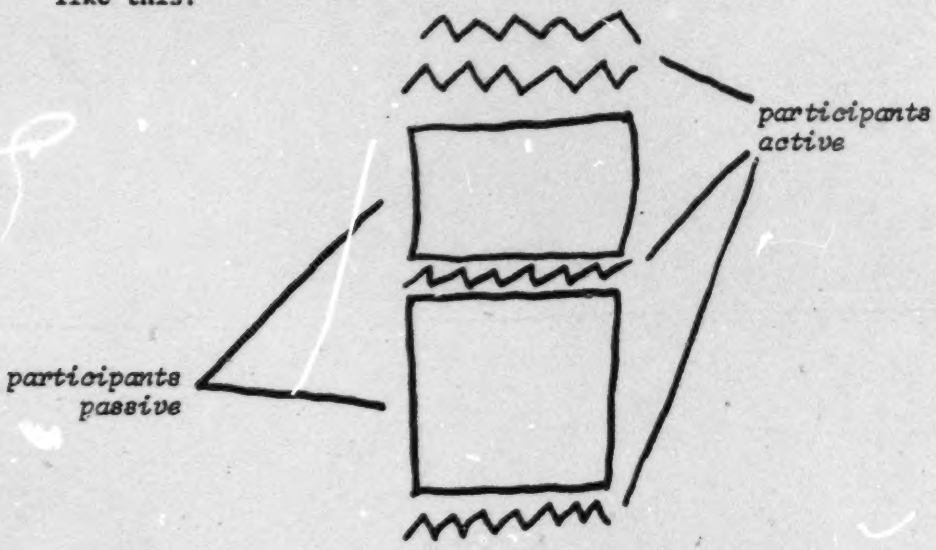
We prepared visual aids for this program. Audrey spent hours and hours making one poster. I told you to spend an hour in preparation time for every minute you're going to speak; well, I haven't seen any guidelines on how long to spend choosing a picture, but I wouldn't doubt it can take an hour. For every picture you use in a workshop, you may have to spend an hour going through books. You may feel guilty about this, because you don't think you're thinking, but you are. Perhaps you can ask people who are artistically inclined to help you. Again, give your staff time and assure them that they are indeed working when they're working on things like this.

You can present things visually; you can also have the participants work on right brain activities. They might do pantomiming for role play, for example. That's an interesting idea, I think. You could do a patron interview in mime, to find out how the people dress, or their body movement, or whether they smile or not, affects the way we feel about them.

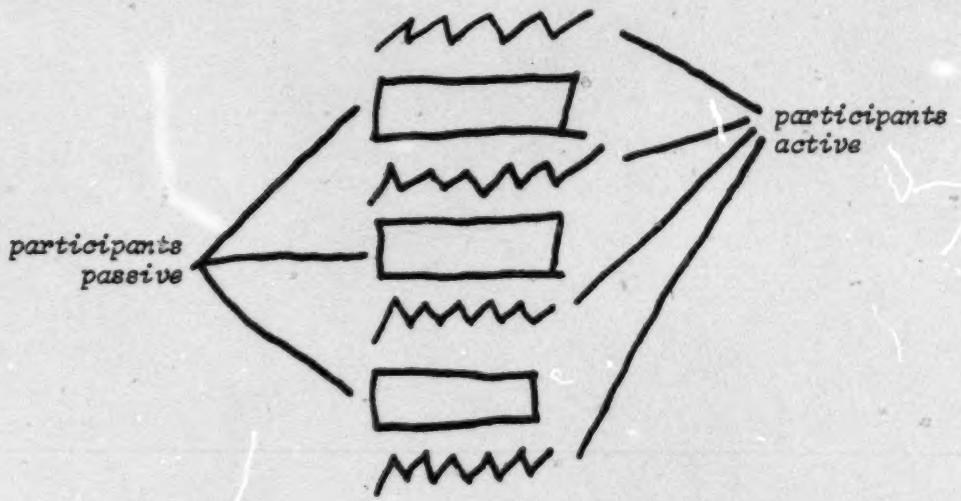
You can view a videotape or film without the sound and see what that brings out. The Milwaukee Public Library did a videotape on reference interview techniques, and a group discussion leader, after viewing it, said, "OK, let's watch it again without the sound and see what we see"; a whole new set of observations were made that might never have been made if that had not been done.

There is another point to remember in choosing films for your workshop. We viewed films for this workshop, hoping we'd be able to show one or two of them. The right brain got very involved in one of the films, watching what people were wearing. It was a film from the 50's, and the make-up, the hair styles, the clothing, the little white gloves, the pillbox hats, the shoes and the stockings, were so distracting that we couldn't have used it effectively. The verbal content was good; it would have been fine as something listened to.

You can have the participants draw things. That's another interesting idea. Provide crayons, paint and paper, and say, "Draw your job." Or, "Draw how you feel about your boss, or how you feel about the participants in the workshop today. What's happening? What are the dynamics of this symbolically?" Here's one of the things we did while preparing this workshop. After the workshop agenda was planned, I drew it on a piece of paper, and it looked something like this.




It turned out that having this imbalance of active and passive audience participation was as bad as it looks like it might be. We got a lot of complaints and changed our agenda the second day. A diagram of the revised agenda looked more like this.




This is visually and aesthetically a lot more pleasing to me than the first diagram is, and we got fewer complaints about our organization of the workshop the second day.

In conclusion, don't forget, if you want to try something new, you can. You may find that something happens one day in a workshop that wasn't planned, but which you liked. Let it happen again if you repeat the workshop and have enough time. Schedule it in the next time. An example of this: You have a major speaker, and find that everybody wants to go to lunch with him or her, or to chat informally rather than having a formal session; for your next workshop, schedule an informal chat with the speaker, or something similar. Even skits might come up informally in a workshop; just let them happen (you might not want to schedule the same thing with a different group). If somebody wants to do something you haven't planned for, and you think it will work, let them do it if it won't throw your schedule off too much.

Finally, mix up the different kinds of things you have happening. It's a little bit like menu planning. You're taught in home economics class that if a meal has different textures, different flavors, and different colors, it's likely to be nutritious and well balanced. The same thing is true of a workshop; think of it as a work of art. If you balance the pace, the amount of audience participation, the noise level, the visual stimulation, the things happening for the left and right brain, the workshop will be a creative work of art.

## SOURCES

Davis, Larry and Earl McCallon. *Planning, Conducting and Evaluating Workshops.* Austin, TX, Learning Concepts, 1975.

The section on presentation techniques has a black fore-edge; the authors know you will keep coming back to it.

Warnke, Ruth. *Planning Library Workshops and Institutes.* (Public Library Reporter No. 17) Chicago, American Library Association, 1976.

Chapters on presentation techniques give many examples with libraries in mind.

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## SELECTING AUDIO-VISUAL TECHNIQUES

Roberto Esteves

You're being passed a sheet [Appendix #8] right now that answers the question: "What is the most effective A-V media to use in any particular situation?" William Allen, known as the guru of A-V media, created this interpretation of what is the best media to use in any particular circumstance. As you can see, it has a 1967 date, so I tried to find some more up-to-date information.

I located an excellent article by Peggy Campo, "Selective Review of the Results of Research of the Use of A-V Media to Teach Adults," in the *A-V Communicator's Review*, Vol. 22, Spring 1974. She analyzed all the research done on the effective use of A-V media in a learning environment, and her conclusion was that there is no significant survey that has yet been made on the effectiveness of A-V media on teaching. There have been no studies of the effectiveness of slides, filmstrips, overhead transparencies and still pictures. There has been no research on radio in the last 25 years. Here is part of her summary:

> What is most impressive about the formidable body of literature surveyed for this review is that it shows that instructional media are being used extensively under many diverse conditions, and that enormous amounts of money are being spent. However, all indications are that decisions as to which audio-visual devices to purchase, install and use have been based upon considerations of cost, availability and user preferences, not on evidence of instructional effectiveness.

So, there is no real way of my telling you what's going to work in a workshop environment. The best you can do is say that whatever you feel to be the best technique is probably going to work best for you. However, I am going to give you some ideas of what I have found works very well, and give you some hints on how to avoid some problems.

First of all, I'm going to break things down into what I consider the four basic functions of A-V in a workshop: (1) gathering information; (2) presenting information; (3) amplifying a presentation; and (4) documenting what you're doing.

The most frequent misuse of media is in the gathering of information. We are all librarians, very left-brain oriented, and seek out print information for everything. However, in certain circumstances we really should use other media. Right now I'm preparing for an ALA workshop on building and space considerations for the use of video and cable tv in a library. Well, I cannot use San Francisco Public Library's 1 17 building as my sole source of architectural information. What I'm done is to contact various people around the country who I know have modern buildings and have been making changes in these buildings for the integration of media, especially video. Many of them are very busy; I've had telephone conversations with each of these people because they didn't even have time to write a report. For the people who have not been able to talk on the telephone, I developed a system whereby they make audio tapes and shoot color slides of the building's video features, critiquing each slide on audio tape. I've found that I've had to go back on the telephone and deal with fuzzy slides and unclear statements. By gathering all the slides together and synthesizing all the audio tapes, as well as telephone notes, I should be able to create a dynamic A-V presentation created by "experts," but for which I'll get credit.

I think the most important medium is the one we don't even often think about: the telephone. How many of you have ever used the telephone in your workshops by having an expert give a lecture disembodied, or maybe by just having some slides while the telephone conversation is going on. I've attended several meetings where speakers gave presentations via telephone over an auditorium P.A. system. It's a

very simple but effective technique. Somebody asked yesterday, "How much does it cost to buy the box to couple into your workshop?" And I said, "Well, it's not very expensive. It's basically an amplifier with a phone coupling device." Today I called Photo and Sound, Inc., to find out how much it costs. The representative said, "Well, as long as you have a phone and a P.A. system, all you have to do is take the two wires at the bottom of your telephone and alligator clip them right into your P.A system, and it's automatically going to amplify both conversations. Alligator clips cost 50¢, and if you have a P.A. system you automatically have the resource to bring in an expert at the cost of a long distance phone call; this way you can add a great deal of flexibility to your workshops. Think about that.

There are other presentational devices, such as films and prepared media. I don't find they work very well, because they never quite fit in. What you have to do in almost every case is explain why you finally did decide to show a particular film, since very infrequently will you find a film that really hits your topic right on the nail. Films are really good for setting an atmosphere or highlighting a topic. For example, I like futuristic films whenever I get involved with media workshops, because they generate discussion about technology.

The important thing to remember about presentational media is to preview it first. If it is going to be introduced by the speaker, make sure you have the compatible equipment for what that person is going to bring in. A slide show is not necessarily going to work on the equipment that you have. There are various slide projectors. Most people use carousel slide trays, but they can use either a horizontally or vertically loaded projector. As a workshop coordinator, it is your responsibility to inform speakers of the equipment available to them.

You should have some sort of budget for media. I'm a great believer in charging for workshops. Have you gone through how much it costs to put on a workshop yet? I think anyone who complains about spending $5 for a workshop, money which would be used to purchase or to rent A-V materials to add a little more zing to a workshop, is being chintzy. Professional librarians should be willing to spend some money for quality workshops. By covering equipment rental and costs, media can be more easily integrated into a workshop, even on the local level.

The other area I want to discuss is amplification. This is a medium in which librarians seem to have the most problems. Amplification is most frequently accomplished with audio equipment. The most common problem encountered when using audio is feedback. The major reason for feedback is overdriving the system by turning the volume too high. The system I'm using today is very good, but some of the older systems are a problem when the volume is turned up to get enough amplification for the back of the room. Check out your equipment to see that the P.A. system does not get overdriven to give the necessary projection for the size of the room. The room size and the projection system must work together. Feedback can also be caused when the microphone is held too close to the audio speakers. Be sure never to stand in front of a lectern speaker, since the speaker and mike start amplifying each other, causing a shrill whine.

You can also use video for amplification. In one workshop we demonstrated a computer terminal. We couldn't get 50 people around the computer terminal, so we put a television set up on top of a filing cabinet, and we had the camera look down in close-up. While the explanation was going on, people could see what was happening on the monitor. That was a use of video without sound for demonstration. You can also use these techniques for amplification of your presentation.

I also want to briefly talk about documentation. As you know, BARC does its documentation on audio tape, then transcribes and edits the tapes into the final version of the proceedings that goes out to you. We have never edited videotapes of a BARC workshop. For some reason people think video documentation is less work. To the contrary, if you're going to videotape a workshop, you still have to decide what you're going to edit out and actually do the process of preparing the final, edited proceedings. It takes the same amount of time, which is considerable. So

regardless of using audio or video, just having it in raw form is not going to give you your product. When someone says to me, "Let's videotape a workshop," I think, "Oh, good grief - why?" Sometimes audio tape will be more effective, especially if the proceedings are to be published in print.

The other way to document, a way we should be using a lot more, especially in smaller workshops, is documenting the workshop with slides - taking still pictures of workshops and the speakers and perhaps editing short presentations on audio cassettes to go with them. I've seen it done once, and I thought it was very effective. It was sort of a travelling workshop. Slides and audio cassettes may not be things you want for a mass audience workshop, but they certainly are practical and easy to produce, especially if an individual wants to hear a speech on a particular topic, or a small group would like to capture the essence of a speaker and his presentation.

Media has the other benefit of standardizing a workshop. I did a workshop explaining cable television as a series of branch programs. It was given in 9 different neighborhoods, and I changed the program content just by changing some of the slides and dialog. Therefore, though some of the basic 36-slides show and script would change, I had a central script I used through the whole series which standardized the information.

I will not go through all the various kinds of equipment, their advantages and disadvantages. I believe that Jerrold Kemp's *Planning and Producing Audio-Visual Materials* [for full citation see Appendix #1] was mentioned earlier. He goes into how to produce slides, transparencies, and some of the problems involved. Are there any specific questions or comments?

Audience comment: A lot of people don't seem to like videotape, but it is often useful to show yourself what you look like.

Mr. Esteves: Oh, as a training technique, there's nothing better than videotape. Right now I'm going to lend equipment to ASIS for their convention, and for a certain amount of time per day each speaker will be allowed to give a presentation and watch a playback of it. It's an interesting technique, one that can be very beneficial.

Question: When you document a workshop on videotape, and you repeat it more than once, do you ever splice them together to create an ideal workshop?

Mr. Esteves: I don't think there is an ideal anything.

Question: No, I mean by taking the best parts of each workshop.

Mr. Esteves: I think BARC does this when they tape each workshop. Each workshop is given two to four times, and they transcribe the speeches which seem most effective.

Ms. Roughton: Which means you have to listen to every speech over again. Anything of that nature takes an enormous amount of time.

Mr. McNamee: Videotaping was useful for BARC's "Reference Potpourri" workshop. We had to give it 6 times, and by videotaping it, when someone was absent we could put that particular part on. It wasn't too long, so you could do it.

Mr. Esteves: Yes, I forgot to mention another use of video - bringing in a speaker who isn't there. We've done that at BARC workshops, when someone didn't show up but had given the speech on a previous day; or, in the case of the travelling workshop we did down in Monterey, take a presentation on videotape. Those are other techniques to use. You're limited only by your imagination and your resources.

## EVALUATION

Anne Roughton

Evaluation is very important. If you've done a thorough needs assessment, if you've written good goals and objectives, and if you've spent time and effort planning the presentation, you will certainly want to know if you succeeded.

You will want to evaluate because you will want to know if your workshop met the objectives you set. You will want to know, also, if the people who attended the workshop thought it was good. Was the program varied enough? Were the participants bored? Were they interested? What parts did they particularly like?

Evaluation results tend to be viewed as facts and figures which one puts into a quarterly report and/or which determine whether the workshop was good or bad, period. But more importantly, evaluation has to do with learning how to improve future workshops. We've given this workshop four times, and every time it's been somewhat different. Yesterday, after the workshop, we decided the afternoon session had too much unrelieved talk. The audience didn't like that and we didn't like that, so we said, "Tomorrow (which is today) we're going to break up that time period." We decided Audrey would talk in the morning, and we put a group discussion period in the middle of the afternoon talk. Evaluation can have that kind of immediate effect if you're going to repeat a workshop; but even if you're not going to do a repeat, you can learn, for future planning, what people like, and what they don't like. If you're going to experiment with something like role playing, I'm sure the first time you do it you will learn a lot about what to do and what not to do. Don't be afraid because you may make a few mistakes.

In California we evaluate because many of us are receiving federal money, and LSCA guidelines say we have to evaluate; we do have to make those quarterly reports. That's one reason to do evaluation, but, I repeat, it is not the only reason.

There are various ways to evaluate a workshop. Today we're going to hand out a written questionnaire and ask you to fill it out [Appendix #9]. Another way would be to take 10 or 15 minutes at the end of the day to talk about how you feel about the workshop - whether you liked it or didn't like it, and what you would change. Or, a day or two after the workshop you can call people on the phone and ask for their comments. You may want to talk, in person, to individuals after the workshop, and ask them how they reacted to the program. Many of us would assume, I imagine, that written evaluations, which are anonymous, would get the most honest response. There have been studies done, however, which show people tend to be very nice on written evaluations (some people aren't, believe me). In person, talking with someone you know, who trusts you, you can often get good in-depth reactions. So I would always, in addition to written evaluations, do some oral evaluation.

With certain types of workshops the attendees' ability or non-ability to perform predetermined tasks at the end of the program will be the evaluation. Yesterday one of the groups planned a workshop on how to answer the telephone. It was short, maybe two hours, and one of the objectives was that at the end of it, the participants would be able to answer the phone and handle three different, difficult situations. You wouldn't need a written evaluation or oral evaluation after that program. If the participants could perform correctly on the telephone, you would know you had achieved your objectives. You might want to do a follow-up three weeks or three months later. You could systematically observe how people were doing with their telephone answering techniques.

When you are doing evaluation: Results should be valid; the method should be efficient; and the results should be useful to you. These may seem like obvious points, but I have a feeling that a great deal of the evaluation done does not meet any of these criteria.

In your packet are some samples of various evaluation sheets, and I'm going to quickly comment on them. What I am going to say is my opinion only. Look at them

and see how you react. The way you react is probably the way a lot of other people will react.

The first form I'd like you to look at is the 4-page Library Planning Institute evaluation form [Appendix #10]. It's long, cumbersome, and rather wordy. However, it contains both open-ended and specific, "check the appropriate box" questions, as a good form should.

The second sheet is called "Evaluation Sheet" [Appendix #11]. It would be easy to fill out - one page, one side; probably people would fill it out and hand it in. It contains no open-ended questions, however. All answers are given on a scale of 1-5. It doesn't give the participants a chance to freely express what they felt about the day; they just circle a lot of numbers. It's a good idea, if you use this kind of form, to include at least 2 or 3 questions which are open-ended. Not everyone will answer them, but some people will want to.

This next form - the Institute Reaction Form [Appendix #12] - strikes me as being just terrible. Please take this as an example of what not to do. It's meaningless.

Just to show you that BARC is hardly perfect, the next questionnaire [Appendix #13] is a good example of a form devised to get positive responses. It is hard to answer any of the questions "no", and therefore, when you read over the "yes" answers, you feel very good. But it's not valid, so don't do it.

This evaluation of a mini workshop, "Giving Better Reference Service" [Appendix #14], is a BARC form we use a lot when we give field workshops. It elicits the kind of feedback I want to get.

Finally, let's look at these last two - Evaluation Form #1, and Evaluation Form #2 [Appendices #15 and #16]. Audrey Powers and I went to a 4-day institute last spring, which was evaluated by an "outside" person - in other words, an expert. Evaluation Form #1 was handed to us when we first arrived at the Institute. We filled it out, putting the last 3 digits of our Social Security Number on it. It has both open-ended and specific, "yes and no" type questions. At the end of the institute we filled out Evaluation Form #2, and we put the last 3 digits of our Social Security Number on it. The two forms are trying to measure how we reacted to the Institute, how it met our expectations, and also what we actually learned. I think they are good forms.

Finally, I want to say that reading evaluation forms can be very exhilerating; it can be very depressing; it can be very puzzling. It can be exhilerating when everybody gives you "good marks," but usually that doesn't happen. Generally you will get a range of reactions to a workshop. It can be depressing, because people will tell you when you don't do a good job. If you have devised a good evaluation form, the workshop's weak points will show up. Evaluation forms can be very puzzling to read, because from the same workshop you may get completely opposite reactions - 10 people will really like it, and 10 people will really dislike it. That leaves one pondering reality, and the vagaries of human nature.

You can't please all of the people all of the time, so never be discouraged by what you read on your evaluation forms. Just learn from them, and next time do an even better job.

* * *

# APPENDICES

APPENDIX #1

FOR LIBRARIANS PLANNING A WORKSHOP
Some Books, Monographs, Manuals, and Documents

American Society for Training and Development. *Training and Development Handbook.* N.Y., McGraw-Hill Book Co., 1967. $21.00. 650p.
32 experts in the field of personnel training and development have contributed articles to this useful book. It covers such subjects as "Determining Training Needs," "Evaluation of Training," "Use of Consultants," "Planning and Scheduling." Articles include bibliographies.

Conroy, Barbara. *Staff Development and Continuing Education Programs for Library Personnel: Guidelines and Criteria.* Boulder, CO, Western Interstate Commission for Higher Education, Jan. 1974. $1.00. 23p. Publisher's address: P.O. Drawer P, Boulder, CO 80302.
A clear, concise, pragmatic set of guidelines and criteria that can be applied to program planning by library schools, library conference and workshop planners, state agencies, proposal writers, etc. The guidelines are concise statements of basic principles on which sound staff development and continuing education programs need be built. The criteria detail the supporting specifics--the "what's" that enable the requirements of the guidelines to be fulfilled.

Corrigan, Dorothy W. *Workbook for a Successful Workshop.* Chicago, American Library Trustee Association, American Library Association, 1967. $1.00. 35p.
An outline of 22 steps for a successful workshop. Emphasis is on "arranging" the workshop; one would need to look elsewhere for detailed information on assessing needs, setting objectives, and program implementation. The reminder lists would be helpful to a workshop planner. Arranged in a rather childish workbook format.

Davis, Elinor L. and Lee-Allison Levene. "Workshop Strategy: a survival guide for planners," *Special Libraries* (Feb. 1975) pp.85-91.
Brief but helpful guidelines covering such topics as defining participants' needs, choosing dates and location, funding, scheduling. Includes a time schedule for carrying out these activities.

Davis, Larry Nolan and Earl McCallon. *Planning, Conducting and Evaluating Workshops.* Austin, TX, Learning Concepts, 1975. $16.95. Publisher's address: 2501 N. Lamar, Austin, TX 78705.
This very useful book would be a valuable aid to both the beginner and experienced workshop coordinator. Beginning with a simplified survey of adult learning theory, the book moves step by step through the workshop process, from the earliest planning stage to the final evaluation. Expensive, but worth it.

*Illinois Libraries* (July 1974). (Issue on Continuing Education)
Articles on various aspects of continuing education; includes an excellent bibliography that covers the literature from 1965 to 1974.

Kemp, Jerrold E. *Planning and Producing Audiovisual Materials.* 3d ed. N.Y., Thomas Crowell, 1975. $10.00.
New edition of basic work on how to plan and produce various types of A-V materials, including slides, tapes, etc. Profuse illustrations demonstrate steps of production techniques.

Kidd, James Robbins. *How Adults Learn.* Rev. ed. N.Y., Association Press, 1974. $14.95. 318p.
Provides both an excellent introduction to the field of adult education and a review of recent research. It is written "not for theorists by a theorist, but for practitioners by a practitioner." Bibliography at the end of each chapter.

Knowles, Malcolm. *The Modern Practice of Adult Education; andragogy versus pedagogy.* N.Y., Association Press, 1970. $12.95. 384p.
Knowles views adult learning as a process of self-directed inquiry and believes this represents a distinct difference from the pedagogical process defined as leading children. He begins his book by defining the term "andragogy" and goes on to show how its application to adult learning makes new techniques necessary. The book explains these techniques. Good bibliographies throughout.

Koberg, Don and Jim Bagnall. *The Universal Traveller, a soft-system guide to: creativity, problem-solving and the process of reaching goals.* Rev. ed. Los Altos, CA, William Kaufman, Inc., 1974. $4.95. 128p. Publisher's address: One First St., Los Altos, CA 94022.
A thoughtful book, about problem solving. It is "dedicated to those who seek to add organization to the problem-solving process we call life. It is for those who desire to take charge of the multitude of situations which confront them and for those who plan to assure themselves of achieving personally and socially satisfying ends." Lots of good sense hints for workshop planners.

National School Public Relations Association. *The Conference Planner; a guide to good education meetings.* Washington, D.C., 1967. $12.00. 56p.
An excellent guide for those planning workshops and conferences.

O'Donnell, Peggy. "Another Opening, Another Show," *Synergy* (Winter 1973) pp.21-24.
BARC's former workshop coordinator provides useful suggestions about why and how to plan a workshop.

Ohio Library Association. *Workshop by Design.* Columbus, OH, 1975. $2.00. 17p. Publisher's address: 40 S. Third St., Columbus, OH 43215.
Publication was intended to help O.L.A. groups design, present and evaluate workshops, but would help anyone with basics. Hints for discussion leaders on their role, and planning an outline.

Ornstein, Robert Evans. *The Psychology of Consciousness.* N.Y., Viking Press, 1973. $8.95. Also published in paperback by Penguin Books, $1.95; and by W.H. Freeman, $4.00.
A lucid, fascinating explanation of the specializations of the right and left hemispheres of the human brain. Information on meditation and on techniques for integrating the modes of thought of the two hemispheres.

Peat, Marwick, Mitchell & Co. *California Public Library Systems: a comprehensive review with guidelines for the next decade.* Los Angeles, 1975.
Read pages 13-1 to 13-4, on Continuing Education. One statement made is: "Library science is changing rapidly and preservice professional education becomes significantly obsolete within a very short time."

*Training and Development Journal.* American Society for Training and Development, 1945- . Monthly. $20.00/year.
Aimed primarily at trainers in business & industry; this is nonetheless definitely worth reading regularly. Short, meaty articles on subjects such as: "Achieving effective meetings--not easy, but possible," "More realistic role-playing," "Train supervisors to train." Has section of book reviews, and a monthly listing of "New Training Tools."

Tulsa City-County Library System. *Workshop on Workshops: a guidance manual.* Produced in cooperation with the Office of Library Independent Study, College Entrance Examination Board, 1975. 31p.

This very helpful manual is for the person planning to conduct a workshop on how to give a workshop. The program is presented in four sections: Defining your goal; Defining your audience; Planning your program; and Planning your evaluation. Group exercises are suggested for each section. The manual will be available for purchase soon; for information contact: Peggy O'Donnell, Southwestern Library Association, 7371 Paldao Dr., Dallas, TX 75240.

U.S. Department of Health, Education and Welfare. Social and Rehabilitation Service. *A Trainers Guide to Andragogy; its concepts, experience and application*, by John D. Ingalls. Rev. ed. Washington, D.C., U.S. Government Printing Office, 1973. 242p.

In the last decade, educators, through research and systematic analysis of experience, have been discovering that adults are different as learners from children as learners. And a differentiated body of theory and techniques for helping adults learn has been accumulating rapidly. This monograph brings together these new concepts and techniques and shows how they can be applied to training.

U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education*, by Elizabeth W. Stone, Ruth J. Patrick and Barbara Conroy. Washington, D.C., U.S. Government Printing Office, 1974.

This report, which was commissioned by the National Commission on Libraries and Information Science, details the urgent need for continuing education for librarians, tells specifically what programs and resources should be developed, and recommends the creation of the Continuing Library Education Network and Exchange (CLENE). Extensive bibliography.

Warncke, Ruth. *Planning Library Workshops and Institutes.* (Public Library Reporter No. 17) Chicago, American Library Association, 1976. $6.00.

This publication is directed primarily to the neophyte who has never given a workshop or institute before, although much will be of interest to the seasoned veteran. From the conceptualization of the objectives through the blocking of the program, determining the costs and making arrangements, this handbook describes the necessary process for producing a successful workshop or institute. Full of fine common sense. Highly recommended.

--Compiled by Anne Roughton & Audrey Powers

APPENDIX #2

# CONTINUING EDUCATION
## Selected Terms and Organizations

### Terms

**ADULT EDUCATION**

A process whereby persons who no longer attend school on a regular and full-time basis (unless full-time programs are especially designed for adults) undertake sequential and organized activities with the conscious intention of bringing about changes in information, knowledge, understanding, skills, appreciation, and attitudes. (Chester Klevins. *Materials and Methods in Adult Education.*)

The process by which men and women (alone, in groups, or in institutional settings) seek to improve themselves or their society by increasing their skills, their knowledge, or their sensitiveness. Any process by which individuals, groups or institutions try to help women and men improve in these ways. (Cyril Houle. *The Design of Education.*)

**ANDRAGOGY** (an' - dra - go - gee)

The word derives from a combination of the classical Greek noun *agoge* (the activity of leading) with the stem *andr* (adult). Andragogy is thus defined as the art and science of leading adult learning (or helping adults learn). (U.S. Dept. of Health, Education and Welfare. Social and Rehabilitation Service. *A Trainers Guide to Andragogy.*)

**CLINIC**

A class, session, or group meeting devoted to the presentation, analysis, and treatment or solution of actual cases and concrete problems in some special field or discipline. (*Webster's Third New International Dictionary.*)

**CONFERENCE**

A formal meeting of representatives of a group for the purpose of discussion and deliberation. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education.*)

A meeting of two or more persons of common interest who come together primarily for consultation, discussion and interchange of opinions and ideas. (*Dictionary of Education*, 3d ed.)

**CONTINUING EDUCATION**

That education which the individual perceives will enhance her or his total job competence. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education.*)

Any extension of opportunities for reading, study, and training to young persons and adults following their completion of or withdrawal from full-time school and college programs. (*Dictionary of Education*, 3d ed.)

CONTINUING EDUCATION UNIT (CEU)

Ten contact hours of participation in an organized continuing education activity under responsible sponsorship, capable direction and qualified instruction. (See: *The Continuing Education Unit: criteria and guidelines*. This 36-page booklet is available from the National University Extension Association, Suite 360, One Dupont Circle, Washington, D.C. 20036. $2.50.)

The CEU is:

--A meaningful unit for measuring participation in continuing education on a stated level of quality, content, and relevance.
--An acceptable means of documenting the worthwhile activities of those who believe that learning is truly a lifetime experience.
--A part of a voluntary system for documenting the efforts of practitioners to maintain or improve their competencies.

The CEU is not:

--Awarded for non-learning activities such as business meetings, or travel time to attend classes.
--The same as a semester hour, a quarter hour.
--Intended to be convertible into academic credits.
--A form of recognition that any institution or organization is required to honor or accept.

CLENE is investigating the possibility of utilizing the CEU for education programs sponsored by CLENE. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education.*)

IN-SERVICE TRAINING

Efforts to promote by appropriate means the professional growth and development of workers while on the job; illustrative are activities such as role-playing, intervisitation, demonstrations, and laboratory sessions. (*Dictionary of Education*, 3d ed.)

INSTITUTE

An instructional program (for a short or long period of time) set up for a special group interested in some type of specialized library activity. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Education.*)

An arrangement for lectures and discussion sessions on a limited subject or theme, usually more intensive than a convention or conference. (*Dictionary of Education*, 3d ed.)

LEARN

1. To gain knowledge, comprehension, or mastery of through experience or study. 2. To fix in the mind or memory; memorize. 3. To acquire through experience. 4. To become informed of; find out. (*American Heritage Dictionary.*)

LEARNING

A change in response or behavior (such as innovation, elimination, or modification of responses, involving some degree of permanence), caused partly or wholly by experience, such "experience" being in the main conscious, but sometimes including significant unconscious components, as is common in motor learning or in reaction to unrecognized or subliminal stimuli; includes behavior changes in the emotional

Learning, continued
sphere, but more commonly refers to the acquisition of symbolic knowledge or motor skills; does not include physiological changes, such as fatigue, or temporary sensory resistance or nonfunctioning after continued stimulation. (*Dictionary of Education*, 3d ed.)

MOTIVATE
To stimulate to action; provide with an incentive or motive; impel; incite. (*American Heritage Dictionary.*)

MOTIVATION
The practical art of applying incentives and arousing interest for the purpose of causing a pupil to perform in a desired way; usually designates the act of choosing study materials of such a sort and presenting them in such a way that they appeal to the pupil's interests and cause him to attack the work at hand willingly and to complete it with sustained enthusiasm; also designates the use of various devices such as the offering of rewards or an appeal to the desire to excel. (*Dictionary of Education*, 3d ed.)

ORGANIZATION DEVELOPMENT (OD)
Organization development has been defined as an effort that is planned, organization-wide, and managed from the top, to increase organization effectiveness and health through planned intervention in the organization's processes, using behavioral science knowledge. (Richard Beckhard. *Organization Development: Strategies and Models.*)

PEDAGOGY
1. The art or profession of teaching. 2. Preparatory training or instruction. (*American Heritage Dictionary.*)

A term derived from the Greek stem *paid-* (meaning "child") and *agogos* (meaning "leading"). So "Pedagogy" means, specifically, the art and science of teaching children. (U.S. Dept. of Health, Education and Welfare. Social and Rehabilitation Service. *A Trainers Guide to Andragogy.*)

ROLE PLAYING
1. The assuming, either overtly or in imagination, of the part or function of another or others. 2. An instructional technique involving a spontaneous portrayal (acting out) of a situation, condition, or circumstance by selected members of a learning group. (*Dictionary of Education*, 3d ed.)

SEMINAR
A meeting for giving and discussing information, for an exchange of ideas in some area. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education.*)

An instructional technique common in but not limited to higher education in which a group of students engaged in research or advanced study meets under the general direction of one or more leaders for a discussion of problems of mutual interest. (*Dictionary of Education*, 3d ed.)

STAFF DEVELOPMENT

A subset of activities within the more general area of continuing education which encompass training designed to guide and encourage staff members to develop skills in relation to identified organizational needs. (Duane E. Webster. Quoted from article in: *Proceedings. First CLENE Assembly.*)

In general, staff development efforts tend to be organizationally centered and directed. Such examples as on-the-job training, coaching, orientation sessions, job rotation reveal this. The purpose of staff development is to improve organization effectiveness by increasing the competence of the staff within that organization. Competence includes the knowledge, skills and attitudes that enable the individual to function satisfactorily alone or with others in a work situation. (Barbara Conroy. *Staff Development and Continuing Education Programs for Library Personnel.*)

TRAINING

Development of a particular skill or group of skills; instruction in an art, profession or occupation. (*Webster's Third New International Dictionary.*)

TUTORIAL

A class in which a tutor gives intensive instruction in some subject to one or a small number of students. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education.*)

WORKSHOP

An instructional method in which persons with common interests and problems meet with appropriate specialists to acquire necessary information and develop solutions through group study. (*Dictionary of Education*, 3d ed.)

A course or discussion group which emphasizes the exchange of ideas and the demonstration of methods and practical application of skills and principles mainly for adults employed in the field. (U.S. National Commission on Libraries and Information Science. *Continuing Library and Information Science Education.*)

A gathering of individuals with a common learning goal that can be achieved through guided instruction and exercise in a brief period of time. (*Workshop on Workshops: a guidance manual.*)

A seminar, discussion group, or the like, which emphasizes exchange of ideas and the demonstration and application of techniques, skills, etc. (*The Random House Dictionary of the English Language.*)

## ORGANIZATIONS

Adult Education Assn. of the USA (AEA), 810 18th St., N.W., Washington, D.C. 20006. This association works to stimulate local, state, and regional adult education efforts and to encourage mutual cooperation and support; to keep in touch with proposed legislation and to initiate legislative action. They publish two periodicals: *Adult Education Journal* and *Adult Leadership.*

American Society for Training and Development (ASTD), P.O. Box 5307, Madison, Wisconsin 53705.

A professional society of persons engaged in the training and development of business, industrial and governmental personnel.

Continuing Library Education Network and Exchange (CLENE), 620 Michigan Ave., N.E., Washington, D.C. 20064.

A national resource agency which was first proposed in the NCLIS Report "Continuing Library and Information Science Education," in May 1974. The structure of CLENE as presently designed provides for: (1) the continual assessment of needs and problems definition; (2) information acquisition and exchange; (3) program and resource development; and (4) communications and delivery to increase the awareness level for continuing education in general and for specific programs--those developed by CLENE as well as those produced by other groups and individuals.

--Compiled by Anne Roughton & Audrey Powers

APPENDIX #3

To: All Librarians who have preregistered for BARC's "Workshop on How To Give Workshops"
From: Anne Roughton, Workshop Coordinator, Bay Area Reference Center.
Date: May 11, 1976

Thank you for your interest in BARC's "Workshop on How To Give Workshops." During our one-day presentation we will be giving an overview of steps that lead to successful workshop production. You can help us in preparing our material in a manner beneficial to the entire audience if you will answer the following questions and return this sheet to the BARC office by May 21, 1976.

Questionnaires should be returned unsigned. You need not answer every question.

PRE-WORKSHOP QUESTIONNAIRE

1. What are one, two, or three principle areas you would like to have covered in the "Workshop on How To Give Workshops"?

2. Have you ever, by yourself, planned a workshop?

3. Have you ever worked in a group responsible for presenting a workshop?

4. Do you have any formal teaching experience?

5. Do you feel comfortable speaking in public?

6. How familiar are you with group process (the ways in which groups function)?

7. Have you studied or had experience in the area of how adults learn? How extensive? Be specific.

8. Is your library currently doing any staff training? If your answer is yes, please give specifics.

9. Are you satisfied with your library's attitude toward staff development?

[OVER]

10. In California, which agency(ies) do you feel should assume responsibility for staff development for public librarians? If you check more than one agency, please assign rankings 1, 2, 3, 4, 5, 6.

Calif. State Lib.____ CLA____ Library schools____

Library systems____ Local city & county libraries____ BARC____

11. There are many ways for teachers to teach, and for learners to learn. What types of presentations do you enjoy/learn from? What types do you not like/ learn from?

| | Learn from | | Enjoy | |
|---|---|---|---|---|
| Lecture | Yes___ | No___ | Yes___ | No___ |
| Panel | Yes___ | No___ | Yes___ | No___ |
| Role play | Yes___ | No___ | Yes___ | No___ |
| Demonstrations | Yes___ | No___ | Yes___ | No___ |
| Slides, filmstrips | Yes___ | No___ | Yes___ | No___ |
| Films | Yes___ | No___ | Yes___ | No___ |
| Videotapes | Yes___ | No___ | Yes___ | No___ |
| Group discussions | Yes___ | No___ | Yes___ | No___ |
| Group "games" | Yes___ | No___ | Yes___ | No___ |
| Problem solving work sessions | Yes___ | No___ | Yes___ | No___ |
| Other: | | | | |

12. In addition to the above, what do you hope to get out of the workshop, and what are your reasons for attending?

Please return to: Anne Roughton, BARC, San Francisco Public Library, Civic Center, San Francisco, CA 94102.

## THE RIGHT ROOM

The right site is very important to the success of the workshop.

There are many requirements for a good meeting place. Probably no room is ideal for everyone, and a room that is perfect for a lecture may be somewhat less than perfect for group discussions. The workshop coordinator, therefore, should have a good idea before choosing the site what type of workshop it will be, and, in addition, the approximate size of the audience.

I am listing, by no means in priority order, some items to think about in selecting a site. Many of the requirements listed pertain to the room itself; some are up to you to add.

Be sure to see and check the room(s) ahead of time; this should be done even if the facilities sound excellent, and even if they are located at some distance from you. They must be seen so that you can determine what you will have to bring with you on the day of the workshop.

1. Is the room comfortable? Air conditioned? Pleasantly decorated? Carpeted? Too hot? Too cold? Too dark? Too light? Street or other interfering noises? Pillars that may obstruct view?

2. Do the windows open? (If not air conditioned.)

3. Do the windows have shades or curtains? (To darken room for films, etc.)

4. How are the acoustics? Would it lend itself to discussion groups?

   Are chairs movable? (For discussion groups and buzz sessions. You may want theater style in the morning and cabaret style in the afternoon.)

6. Does it have a stage? (Or raised platform for speakers, panels, role-playing, etc.)

7. Does it have a lectern? With a light?

8. Is there a sound system?

9. Does it have a blackboard?

10. Does it have a movie screen? TV monitors?

11. Is there room for videotape equipment?

12. Does it have tables? In the room or nearby? (For the projectors, discussion groups, exhibits, panels, working space, etc.)

13. Are the walls conducive to having posters and other exhibit-like materials?

14. Is there a place for a comfortable, fast registration?

15. Is there a place for coats, hats and umbrellas?

16. Can refreshments be had in the room? If not, be sure to find out closest place.

17. What is the best arrangement for smokers and non-smokers? Smokers in back? In front? On right? Left? Breaks?

18. Where is the closest telephone? Typewriter? Copying machine?

19. Where are the rest rooms?

20. Where are the electrical outlets?

21. Where is the fuse box?

22. What are the security precautions of the room? Nearest exit?

23. Is parking available? Free? Or closest parking lot? (Should be in announcement.)

24. What buses or streetcars serve your site? Approximate cab fare from terminals to site? (Should be in announcement.)

25. Is there a map indicating how to get to location? If not, make one. (Should be in announcement.)

26. Does the way to the room need directional signs?

27. Workshop coordinator should have or provide:

a. Water pitcher & glasses.
b. Watch with sweep second hand for timing (many meeting rooms do not have clocks).
c. Waste baskets.
d. Pointer (for blackboard).
e. Chalk.
f. Eraser.
g. Thumbtacks.
h. Masking tape.
i. Extension cord(s).
j. Three-prong adapter(s).
k. Pencils.
l. Paper.
m. Cash box (for registration). (And provide security.)
n. Change for persons at registration.
o. Spares--projector lamps, audio/TV tapes.

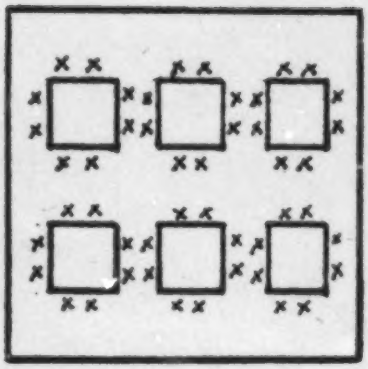
28. In addition to the above, if a hotel/motel is to be used, the workshop coordinator should also:

a. Get to know the meeting/conference manager well.
b. Know the approximate number who will require sleeping rooms.
c. Determine whether special rates are available to groups.
d. Know how the meeting rooms and eating rooms should be set up.
e. Know if special equipment will be needed and if there are special or no charges for this.
f. Should know where hotel contact person is during the meeting day for emergencies.
g. Make sure there are signs for registration, information.
h. Make sure meeting is listed on hotel's bulletin board.

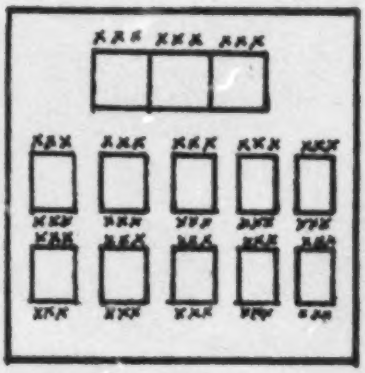
* * *

--Gil McNamee

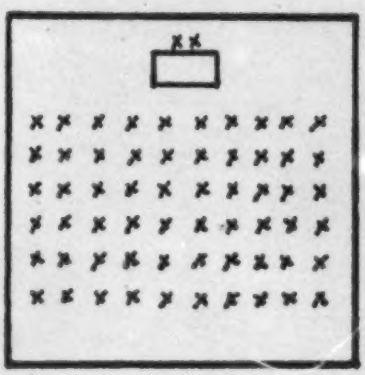
# SEATING ARRANGEMENTS



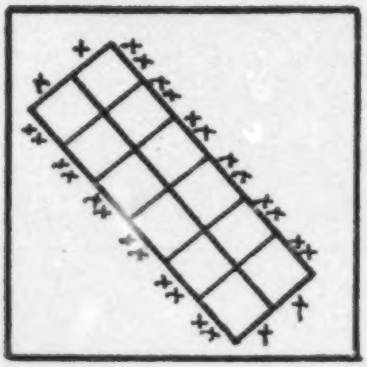
CABARET STYLE



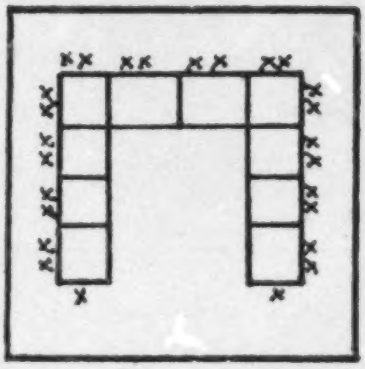
INDIVIDUAL BANQUET



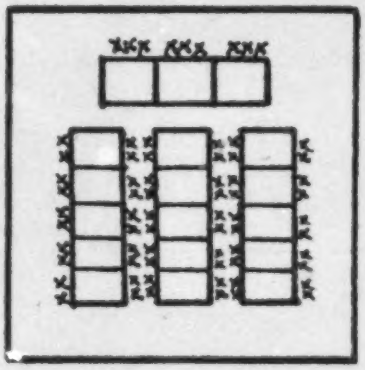
THEATRE STYLE



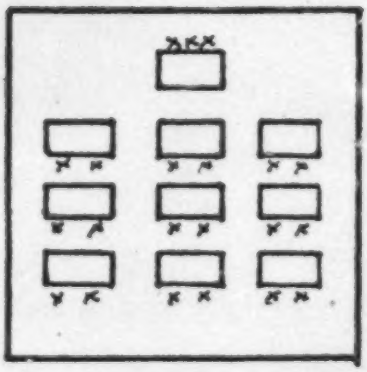
DIRECTORS STYLE



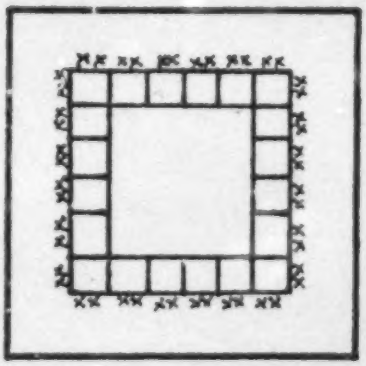
"U" SHAPE



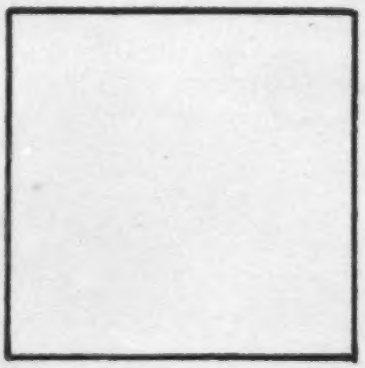
"E" SHAPE



CLASSROOM STYLE



CONFERENCE STYLE



YOUR OWN STYLE

APPENDIX #6

## LEARNING LAWS AND THEORIES

Excerpted by Dorothy Parrish from ASTD materials, for use with SFPL supervision class, 1975.

1. TRAINING SHOULD BE PLANNED.

   a. Planning activities which draw upon the trainee's needs and interests will incresae the likelihood of learning.
      --Pleasant things are learned more readily than unpleasant things.
      --Both pleasant things and unpleasant things are more effective as learning motivators than things that arouse no emotion.

   b. Key points should be repeated and emphasized.
      --Key points should be made near the beginning and near the end. These are the last to be forgotten. Points made close to the middle of a presentation are the ones most likely to be forgotten.

2. BEFORE BEGINNING TO TRAIN, THE TRAINER MUST PREPARE THE LEARNER.

   a. To be ready to learn, the trainee needs to know specifically
      --What skills, knowledges and attitudes need to be developed
      --What objectives the training is designed to meet
      --What standards of performance will be applied to measure progress at various points during the training (intermediate achievement goals)
      --What standards will be applied in evaluating on-the-job performance after training is completed
      --How learning is to be applied.

   b. If the trainee doesn't see the training as useful (or for some other reason is not motivated to learn), only minimal learning is likely to take place.

   c. If the trainee finds the prospect of the learning meaningful and and learning process satisfying, learning is most likely to take place.

3. LEARNING SHOULD BE ACTIVE, NOT PASSIVE. THE LEARNER MUST BE INVOLVED.

   a. It has been demonstrated that learners remember
      --10% of what they read
      --20% of what they hear
      --30% of what they see
      --50% of what they see and hear
      --70% of what they say
      --90% of what they say as they do a thing

   b. When used together with understanding, drilling (repetition, memorizing, etc.) is helpful for learning facts or figures.

   c. Recall is usually better if information is understood rather than just repeated or memorized without any real understanding.

   d. The most effective learning stimulators are those that arouse emotion; the least effective learning stimulators are those that arouse little or no emotion.

4. THE TRAINEE NEEDS TIME TO ABSORB, ACCEPT AND PRACTICE APPLYING NEW LEARNING. ALLOW TIME FOR PRACTICE.

   a. Practicing a task over several short time periods is usually more beneficial than practicing for the same total time in a single period.

b. The less prior experience the trainee has had in performing the task, the more beneficial it will be to spread out practice over short time periods.

5. KNOWLEDGE OF RESULTS OF PRACTICE INCREASES LEARNING.

   a. To be effective, the trainer must give feedback on what to do and not just on what not to do.

   b. Positive feedback produces learning more readily than negative feedback.

   c. Both positive and negative feedback are more effective as learning motivators than no feedback.

   d. Continuous severe negative feedback inhibits learning.

   e. Positive feedback acknowledging everything the learner does correctly will soon prove ineffective.

   f. Too much feedback can be as harmful as too little feedback.

   g. Feedback during early stages of the learning process is most important.

   h. Simpler tasks require less feedback than more complicated tasks.

## TEN PRINCIPLES FOR QUICK AND EFFECTIVE TRAINING

1. Training should help accomplish measurable objectives.

2. Training should contribute to the employee's motivation to do what needs to be done.

3. Training should be based upon a careful analysis of what the learner needs to know--distinguish necessities from "niceties."

4. Training should cover one thing at a time; e.g.
   a. Teach what key terms mean before using them in how-to-do-it training;
   b. Teach how to handle normal operation before teaching how to handle abnormal operation.

5. Training should help the learner develop confidence & help the learner succeed:
   a. Avoid "observation training" where learner doesn't really know what s/he is observing;
   b. Emphasize what the learner knows versus what s/he doesn't know;
   c. Tell the learner what common errors are and how to avoid them. Don't use the "discover and learn from errors" technique.

6. Training should have variety; e.g., short presentations, tours, visual aids, guest instructors, games.

7. The learner should be given handouts summarizing key points to remember.

8. There should be learner feedback throughout the training (try-outs, practice, discussions, quizzes) to make sure the learner understands.

9. Training should help sell employees on their jobs.

10. The trainer's actions should show support and understanding of the training.

APPENDIX #7

## TIPS FOR DISCUSSION LEADERS

1. Create a congenial atmosphere. Your initial comments and action will, to a great extent, determine the climate of the entire discussion.
2. Show respect for opinions of all participants without evaluation or criticism. Redirect members' questions to the group rather than trying to answer.
3. Listen actively to comments of all group members. Let participants see, by your example, the importance of active listening.
4. Aid the group in exploring gray areas or complicated issues by drawing on opinions.
5. Guide the discussion allowing it to rest from time to time on focal points.
6. Allow development of the topic to progress normally remaining flexible enough to formulate new questions as it moves from one phase to the next.
7. Capitalize on the interests exhibited by members. Follow with questions they can answer from experience.
8. Most issues are multi-faceted. Give equal time to all sides.
9. Watch body language for reactions and make special effort to give those showing readiness to speak the opportunity to do so.
10. Give everyone a chance to express himself or herself.
11. Decide when and how far to allow departure from the topic. Practice your decision fairly and firmly.
12. Examine opposing positions. Disagreement is valuable to good discussion. Build on it.
13. Summarize the discussion mentioning 1) any conclusions drawn by the group, and 2) those points not fully explored as members may wish to reserve for special study or committee work.
14. Evaluate in terms of progress, areas of strong agreement or disagreement, individual participation, changes in attitude, and roles of participants.

## SOME THINGS TO DO

1. Help the members get acquainted with each other.
2. Call the meeting to order and explain the purposes and nature of the meeting.
3. Help the group to set its own goals
4. Help the group to set up its own system of operation.
5. Help the group make decisions for itself.
6. Maintain informality throughout the discussion.
7. Help the group summarize ideas.
8. Help all members to participate.
9. Try to fiture out what is needed in the group at any particular time and encourage those who can meet these needs to take part.
10. Encourage everyone to lay his or her cards on the table.
11. Help the group stay on the track.
12. Encourage the group to evaluate itself.
13. Suggest that the group arrange itself in as near a circle as possible, in order that each person can see all other persons in the group.
14. Provide table space on which group members can work.
15. Make people as comfortable as possible; see that someone checks the ventilation and lighting.
16. Learn members' names as quickly as possible; provide visible and readable name tags where necessary.
17. Use names when addressing members - first names if at all appropriate.
18. See that there is a blackboard or newsprint that is easy to see and near enough to use comfortably.
19. Suggest that a group member record on a blackboard or newsprint when appropriate.
20. Suggest that the group form an agenda early in the discussion.

21. Encourage the group to agree on a methodology of procedure before "jumping in" to the discussion itself.
22. Aim in the discussion itself to be a "leader" as little as possible; if they forget who is the leader it is a good sign.
23. Attempt to attune yourself to "listen" for the feelings as well as the ideas of members; listen for what is behind the remark as well as the remark itself.
24. Accept the feelings and ideas of all group members.
25. Look mainly at the overall group atmosphere; do not be trapped into over-reacting to the needs of specific individuals; try to maintain a balance of sensitivity to the task, group, and individual needs.
26. Listen attentively to what each member has to say; listen in such a manner that the member will see that you are listening and that you are genuinely interested.
27. Use "we" instead of "I" or "you"; encourage by manner and speech the concept of "our group."
28. Encourage a broad view of the problem and wide participation by occasionally asking if there are alternate points of view.
29. Confront the group occasionally with its pacing problem by asking if the group wishes to discuss the problem further, to set a tentative time limit or to go on to another agenda item.
30. When disagreement occurs, turn discussion to the group for solution.
31. Ask the group to verify all summaries.
32. If a disagreement or polarization continues, suggest making a clear statement of the problem on the blackboard and an itemization of the relevant data; arguments disappear when data are available.

## WHEN YOU ARE A DISCUSSION LEADER...DON'T

1. Do not require members to get permission to speak, or require any other formalities.
2. Do not have people stand to speak or address the chair.
3. Do not encourage members to talk to the chairperson; discourage this by letting other members respond or by asking other members their opinions on the matter.
4. Do not preach or teach.
5. Do not moralize or make value statements.
6. Do not show your own opinion of members' remarks; try to set aside your own evaluation of ideas offered by the members.
7. Do not form any private opinions of what the group should be discussing or what it should take up next, so that you may avoid judging any comment as irrelevant or off the subject.
8. Do not take sides or argue on any issue, or identify with any sub-group or clique.
9. Do not manipulate, guide the discussion, attempt to control or push.
10. Do not make a speech; do not talk too much; leaders almost always talk too much and too often; when in doubt, don't say it.
11. Do not encourage people to participate before they feel like it; let them be quiet if they wish.
12. Do not hold any member up to ridicule or embarrass any member.
13. Do not hog the spotlight.
14. Do not be tempted to show off your verbal ability or your skill; you should not be particularly noticed or remembered; you are the catalyst.
15. Do not be defensive; do not defend your behavior or position; accept <u>all</u> criticism.
16. When in doubt as to whether or not to intervene at some particular point, control the impulse, do not intervene; do not intervene unless you are quite sure that the group will be helped to move toward its goal.

## THE ROLE OF THE DISCUSSION LEADER

| When the leader hears/observes | s/he seeks to | using such words as |
|---|---|---|
| ideas | welcome them, record them, and relate them to the agenda if this seems necessary | a friendly cordial and encouraging manner--as a nod, smile, etc., but as few words as possible. The fact of a contribution should be welcome without judging the idea. If necessary to point out the relationship, be brief. Note ideas on your outline. Be sure to pick up "out-of-order" contributions later. |
| confused or inexpertly worded ideas | to clarify by inviting a member to restate it or restating it him/herself, or by asking for definition of critical words | "could you explain that a little more fully? or give an example?" "Would it make that a little clearer if we defined a few words, for instance___?" "Is what you are saying this___? or have I misinterpreted you?" |
| two or more ideas included in one contribution | distinguish the two ideas and propose separate consideration | "are there perhaps two ideas in what you have just said: such-and-such, and such-and-such?" |
| ideas contributed which are unrelated to the agenda or subject | prevent consideration of the irrelevant idea without discouraging the member who contributed it, and return to the agenda | "this is one of a great many things we are all interested in; but we will have to avoid getting too interested, or we will never cover our agenda; isn't our topic really ___? Does someone have a point to contribute on that?" |
| some important ideas are not being contributed | have the idea presented | "does this have anything to do with the idea that ____?" "Can anyone explain the difference between the proposal which has just been made and ____, which some people have suggested?" "I talked with a taxi-driver recently who said ____. How does this idea impress you?" "Suppose you were faced with a case like this: ____. What would you suggest in such a case?" |
| fragmentary or incomplete ideas | hold the attention of the group at this point while the idea is developed more carefully | "Let's stay with the point ____ has made for a minute." "Before we go further, can we add to the idea just suggested." "Perhaps there's even more to be said on that point. Would you like to amplify it, ____?" |
| wide divergence from the agenda | bring the group back to the agenda | "That's an interesting idea, but does it fit into our agenda?" "Right now we're at this point on our agenda. Would you agree that the point really belongs here (indicate later question); will you remind us of it when we get there?" (but call for it yourself). "Is this a point we should have considered before (show where); shall we take time now to consider it?" (defer to judgment of group). |

| | | |
|---|---|---|
| signs of inattention, lack of interest, or boredom | stimulate interest | "Can we bring this down to our own experience? Just how would these proposals affect us now?" "Let's get some homely illustrations on this." "Isn't our discussion becoming a little remote? Could we restate the question this way?" "I heard an amusing story yesterday that reads on this point" (be sure it really does). |
| evidence of lack of information | have necessary information introduced | "____ who is our guest has done some special work in this field. Could you supply this information for us?" "____, there is a World Almanac; would you look up the figures on that point?" "Won't this chart give us the data we need, ____? I think you can see it better than some. How does it apply?" |
| wasteful repetition | encourage the group to contribute new ideas or to move to another point on the agenda | "Do we need to recall the points already made?" (Summarize) "Is this another example of the point ____ made awhile back?" "Are we beginning to say (in different words) things we've already said? Do you think we have covered this phase of the subject; so far we have said (summarize); is there anything different to add or are we ready to move on?" |
| the proper moment in time for transition to another agenda question | indicate progress to date in a summary and invite consideration of next point | "We have beer discussing this question on our agenda (point to or state), and our ideas seem to be these (summarize). Are we ready now to move on to the next question? |
| significant consensus | call attention to it as an indication of progress in narrowing area of disagreement | "It appears that we are all agreed that ____. That narrows the subject for discussion down to ____. What do you think about that?" |
| significant disagreement | ascertain whether it is disagreement which can be reduced by further discussion or whether it must be accepted for the time being (as pending securing of new information, etc.) | "We seem to have a difference of opinion on this point. Can we dig a little deeper to see why this difference exists? ____, what are your reasons for your position?" Or, "The point on which we differ seems to be ____, and I don't see how we can get the facts we need on that tonight. Can we agree to disagree and move on to another part or aspect of the problem?" |
| signs of emotional disturbance | prevent the disturbance from spreading & resolve such conflicts as exist | "We have two or three points of view on this; one or more persons feel very strongly that ____ and another number feel just as strongly about this position, etc. (Define the feeling, states that are behind what is being said, disgust, hostility, excitement, threat, etc.). Are there other points of view, or suggestions about how to resolve our differences?" |

| | | |
|---|---|---|
| signs of fatigue | relieve the fatigue | "Suppose we take time out for a smoke. There is a coke machine down the hall. Let's reassemble in 10 minutes." "I think we'd all feel better if we took a break." |
| signs of authoritarian domination by one member of group | build up the confidence & ability of the group to resist any domination | "Certainly every citizen's viewpoint counts on this. What do some of the rest of you think about it?" "Let's get a variety of ideas into the pool before we go further. What do the rest of you think?" |
| two or more people talking at once | be sure everyone gets to talk, but one at a time | "Just a minute--we don't want to miss any of this, but let's take it one at a time." (Call on one; then hold that idea in reserve and call on the other.) |
| opinions presented as facts | be sure that fact and opinion are clearly differentiated | "Can you give us the facts on which you base that opinion?" "Do you all agree with that?" "How do these opinions check with the facts?" |
| a member of the group tries to involve him or her in controversy | maintain his/her position as an interested nonpartisan | "Right now I'd like to get the ideas of all the group on this; perhaps some other time you and I can pursue this idea. What do the rest of you think on this point?" |
| members of the group attempt to treat him/her as authority, teacher, or expert | maintain his/her position as a co-leader deferring to the wisdom of the group | "That's an interesting question. Does anyone in the group have an answer for it? I'd be interested, too, in knowing what the group thinks about that point." |
| a non-contributing member | encourage the member to make some contribution | If member is known by the leader to have the facts on a relevant point, call on him or her for that. Or again, if views of this member are known, introduce a comment closely related to them. Or watch for signs of silent participation (nodding or shaking head, etc.) and when appropriate, remark, "____, you seem to agree with that, don't you?" Or call on the member to perform a specific task, as consulting a reference book, or reading from a newspaper clipping. Anything that will require a timid person to speak out loud once in the group will encourage him or her to participate thereafter. |
| periods of silence | decide whether it is productive or nonproductive silence. In the first case, s/he does nothing; in the latter, s/he seeks to stimulate active discussion | "What first-hand experience do we have which is pertinent here?" "Do we need to recapitulate?" (Summarize and introduce a stimulating question.) "I heard one person say on this point ____" (present a real or manufactured quotation that is sufficiently extreme to provoke comment). |

## QUESTIONS DESIGNED TO IMPROVE MEETINGS

Questions designed to OPEN UP DISCUSSION

1. Could we clarify the terms connected with this topic?
2. What do you think the general idea or problem is?
3. What are the elements essential to understanding the topic?
4. Does anyone have suggestions on facts we need to better our understanding of the problem or topic?
5. What has been your experience in dealing with this problem or topic?

Questions designed to BROADEN PARTICIPATION

1. Now that we have heard from a number of our members, would others who have not spoken like to add their ideas?
2. How do the ideas presented thus far sound to those of you who have been thinking about them?
3. What other phases of the problem should we explore?

Questions designed to LIMIT PARTICIPATION

1. To the overactive participant: We appreciate your contributions. However, it might be well to hear from some of the others. Would some of you who have not spoken care to add your ideas to those already expressed?
2. Would someone else like to make some remarks?
3. Since all our group members have not yet had an opportunity to speak, I wonder if you would hold your comments until a little later?

Questions designed to FOCUS DISCUSSION

1. Where are we now in relation to our goal for this discussion?
2. Would someone review their understanding of the things we have said and the progress we have made in this discussion?
3. Your comment is interesting. However, I wonder if it is quite germane to the chief problem before us.

Questions designed to HELP THE GROUP MOVE ALONG

1. If we have spent enough time on this phase of the problem, should we move to another aspect of it?
2. Have we gone into this part of the problem far enough so that we might now shift our attention and consider this additional area?
3. In view of the time we have set for ourselves, would it not be well to look at the next questions before us?

Questions designed to HELP THE GROUP EVALUATE ITSELF

1. I have a feeling that we are blocked on this particular issue: Why are we tending to slow down?
2. Should we take a look at our original objective for this discussion and see where we are in relation to it?

Questions designed to HELP THE GROUP REACH A DECISION

1. Am I right in sensing agreement at these points? (Leader then gives brief summary.)
2. Since we seem to be tending to move in the direction of a decision, should we consider what it will mean for our group if we decide the matter this way?
3. What have we accomplished in our discussion up to this point?

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APPENDIX #8

Equipment/Media Relationships and Considerations

| Instrument | Media Used | Material Production Considerations | Availability of Facilities and Equipment | Equipment Costs |
|---|---|---|---|---|
| Filmstrip or slide projector | 35mm filmstrips or 2x2 slides | Inexpensive; may be done locally in short time. | Usually available; requires darkened room. | Low |
| Overhead transparency projector | Still pictures and graphic representations | Very inexpensive; may be done locally in short time. | Available; may be projected in light room. | Low |
| Wall charts or posters | Still pictures | Very inexpensive; may be done locally in very short time. | Available; no special equipment needed. | Very low |
| Motion pictures (projection to groups) | 16mm motion pictures (sound or silent) | Specially-produced. Sound film is costly and requires 6-12 months time. | Usually available; requires darkened room. | Moderate |
| Motion picture projection as repetitive loops (8mm silent) to individuals | 8mm motion picture film (silent) | Special production normally necessary. May be produced as 16mm film alone or locally at low cost and in short time. | Not normally available; will need to be specially procured to meet requirement of instructional program. | Low per unit, but moderate for groups |
| Magnetic tape recorder | 1/4" magnetic tape | Easy & inexpensive. Usually produced locally. | Available. | Low |
| Record player | 33 1/3, 45, or 78 rpm disc recordings | Need special recording facilities; usually commercially made. | Usually available. | Low |
| Display area | 3-D models | May vary in complexity & in difficulty of production; component parts easy to obtain. | Available. | Varies from low to high |
| Television (closed-circuit) | Live presentations; motion picture film; videotape recordings; still pictures | Normally requires large & skilled production staff. | Not normally available. | Moderate to high |
| Teaching machines & programmed textbooks | Programmed material | Some programs available commercially, but will normally be specially prepared for course. | Not normally available. | Low per unit, but moderate for groups |
| System combinations | Television; motion pictures; still pictures; audio recordings. | Complex; probably will be done locally to meet specific requirements. | Not noramlly available. | Moderate to high |

## Instructional Media Stimulus Relationships to Learning Objectives*

| | LEARNING OBJECTIVES: | | | | | |
|---|---|---|---|---|---|---|
| | Learning Factual Information | Learning Visual Identifications | Learning Principles, Concepts and Rules | Learning Procedures | Performing Skilled Perceptual-Motor Acts | Developing Desirable Attitudes, Opinions & Motivations |
| INSTRUCTIONAL MEDIA TYPE | | | | | | |
| Still Pictures | Medium | HIGH | Medium | Medium | low | low |
| Motion Pictures | Medium | HIGH | HIGH | HIGH | Medium | Medium |
| Television | Medium | Medium | HIGH | Medium | low | Medium |
| 3-D Objects | low | HIGH | low | low | low | low |
| Audio Recordings | Medium | low | low | Medium | low | Medium |
| Programmed Instruction | Medium | Medium | Medium | HIGH | low | Medium |
| Demonstration | low | Medium | low | HIGH | Medium | Medium |
| Printed Textbooks | Medium | low | Medium | Medium | low | Medium |
| Oral Presentation | Medium | low | Medium | Medium | low | Medium |

*William H. Allen, *1967 Audiovisual Instruction.*

APPENDIX #9

## EVALUATION FORMS - SAMPLE COPIES

LSCA guidelines require that all ongoing services of federal projects be evaluated by the users of the services. ("Include some means of assessing user opinion of the project.") The Bay Area Reference Center would appreciate your remarks as users of the workshop program. Would you please fill in this questionnaire before leaving today?

### Evaluation of "A Workshop on How To Give Workshops"

1. The objective for this workshop was: "To enable the audience participants--through definition, explanation and practical exercise--to understand and put to use the basic steps of workshop production." With that objective in mind please rate this workshop:

   _____Excellent _____Good _____Average _____Fair _____Poor

2. In terms of meeting my own objectives for attending, this workshop was:
   _____more beneficial than expected _____less beneficial than expected
   _____equal to expectations

3. Did you gain any new knowledge of workshop production?
   _____Yes, a great deal _____Yes, some _____Not too much _____None whatsoever

4. Do you feel that you now know enough about workshop production to work effectively as part of a group responsible for producing a workshop?

   _____Yes, now that I have attended this workshop.
   _____Yes, but I could without having gone through this workshop.
   _____No, I need more information/instruction.

   (When completing questions numbered 5 & 6, check as many answers as are relevant.)

5. Which parts of this workshop were most interesting and/or worthwhile for you?

   ____Assessing needs
   ____Preparing objectives
   ____Defining the audience
   ____Speakers, room arrangements, etc.
   ____How adults learn
   ____Audiovisual resources
   ____Selecting presentation techniques
   ____Follow-up
   ____Evaluation

6. If parts of this workshop were of little or no value, please indicate which parts.

   ____Assessing needs
   ____Preparing objectives
   ____Defining the audience
   ____Speakers, room arrangements, etc.
   ____How adults learn
   ____Audiovisual resources
   ____Selecting presentation techniques
   ____Follow-up
   ____Evaluation

7. If you were planning a workshop similar to today's program, how would you change the amount of information presented on each subject?

| | less information | same amount | more information |
|---|---|---|---|
| Workshop planners | | | |
| Assessing needs | | | |
| Preparing objectives | | | |
| Defining the audience | | | |
| Speakers, room arrangements, etc. | | | |
| How adults learn | | | |
| Audiovisual resources | | | |
| Presentation techniques | | | |
| Follow-up | | | |
| Evaluation | | | |

8. Would you recommend this workshop to librarians interested in learning about workshop production?

___Yes ___No ___Yes, with these reservations_____

9. Please write here any other comments you would like to make about the workshop.

10. How would you change this evaluation form? Be specific.

APPENDIX #10

LIBRARY PLANNING INSTITUTE - UNIVERSITY OF SAN FRANCISCO, JUNE 23-27, 1975

## EVALUATION QUESTIONNAIRE

TO WHAT EXTENT DO YOU BELIEVE THAT:

| | To a Very Little Extent | To a Little Extent | To Some Extent | To a Great Extent | To a Very Great Extent |
|---|---|---|---|---|---|
| 1. Institute goals were clear? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 2. Participants adequately considered the library needs of the state's citizens? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 3. You were given full opportunity for participation? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 4. You did participate fully? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 5. You really felt involved? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 6. Your ideas were taken seriously? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 7. Institute findings were made explicit? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 8. To the best of your knowledge of the findings, you agree with them? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 9. The Institute changed your prior views about library development? | ☐ | ☐ | ☐ | ☐ | ☐ |
| 10. The Institute reinforced your prior views about the direction of library development? | ☐ | ☐ | ☐ | ☐ | ☐ |

David W. Taylor
June 26, 1975

USING THE BELOW SET OF POLAR TERMS, RATE THE INSTITUTE BY PLACING AN "X" SOMEWHERE AT THE LOCATION ALONG THE SEVEN-POINT SCALE WHICH BEST INDICATES HOW YOU NOW PERCEIVE OR FEEL ABOUT THE INSTITUTE.

INSTITUTE

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 11. | Good | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Bad |
| 12. | Pleasurable | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Painful |
| 13. | Rigid | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Flexible |
| 14. | Important | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Unimportant |
| 15. | Successful | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Unsuccessful |
| 16. | Boring | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Interesting |
| 17. | Authoritarian | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Democratic |
| 18. | Relaxed | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Tense |
| 19. | Shallow | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Deep |
| 20. | Worthwhile | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | Worthless |

21. What did you like most about the Institute?

22. What did you like least about the Institute?

23. Which TWO speakers were you most pleased with? Why?

24. To what extent do you believe the PM&M study has and will be useful in planning and implementing improved library services?

☐ ☐ ☐ ☐ ☐

Useful — Useless

25. The Nominal Group Process was used in small group discussion sessions. To what extent do you feel the Nominal Process is more or less effective than a traditional process for the purposes of this Institute?

☐ ☐ ☐ ☐ ☐

Traditional More Effective — Nominal More Effective

26. Do you expect to make use of the Nominal Process in future meetings for which you will be responsible?

☐ ☐ ☐ ☐ ☐

Definitely Yes — Yes — Maybe Don't Know — No — Definitely No

27. Do you believe that the development of an expanded planning-research-evaluation capability within the state's library community would be desirable? If so, under whose authority?

28. To what extent do you believe the goals of the Institute were achieved?

To a Very Little Extent ☐ ☐ ☐ ☐ ☐ To a Very Great Extent

29. To what extent do you believe the Institute has contributed to the prospective strengthening of state-wide library development in California?

☐ ☐ ☐ ☐ ☐

To a Very Little Extent — To a Very Great Extent

30. Overall, how satisfied were you with the INSTITUTE?

☐ ☐ ☐ ☐ ☐

Very Satisfied — Satisfied — Uncertain — Dissatisfied — Very Dissatisfied

31. Comments, suggestions, recommendations:

32. Please check the box below which best identifies you.

Public Librarian ☐
Public School Librarian ☐
Government Official ☐
Academic Librarian ☐
Special Librarian ☐
Trustee, Advisor, etc. ☐

! THANK YOU VERY MUCH !

APPENDIX #11

**EVALUATION SHEET** Name: Date:

1. Was there sufficient variety of presentation to maintain your interest? (Put a cross on the scale to indicate your opinion).

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| no variety | | adequate variety | | greatly varied |

2. Was the presentation made in a logical sequence?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Poor logical sequence | | reasonably logical | | quite logical |

3. How clearly were the instructional objectives stated?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| poorly | | adequately | | clearly |

4. Were the speakers interesting in their oral presentation?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| not at all | | fairly interesting | | very interesting |

5. Were there any visual or oral distractions in the program?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| many | | few | | none |

6. Were the visual materials clear?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| unclear | | fairly clear | | very clear |

7. Was adequate revision or recapitulation provided?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| inadequate | | fairly adequate | | quite adequate |

8. Did the module contain the right amount of material?

(a) Yes, about right.
(b) No, too much. Ans. [ ]
(c) No, too little.

9. Name the part of the module which you found most satisfactory.

_____
_____
_____

10. Name the part of the module which you found least satisfactory.

_____
_____
_____

11. List any difficulties you had with setting up or running the program.

_____
_____
_____

12. How successful was this program in meeting your needs?

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| not at all | | adequate | | extremely successful |

APPENDIX #12

# INSTITUTE REACTION FORM

EVALUATION OF SESSIONS FROM _____THRU_____

Circle One:

Methodology 1 2 3 4 5 6 7

Out-standing Inferior

Content 1 2 3 4 5 6 7

Out-standing Inferior

Things you liked about these sessions:

Things that could be improved:

Sign last 3 numbers of your
Social Security Number

_____

APPENDIX #13

New LSCA guidelines require that all ongoing services of Federal projects be evaluated by the users of the services. ("Include some means of assessing user opinion of the project.") BARC would appreciate your remarks as users of the workshop program.

Would you please fill in this questionnaire before you leave today?

Have the BARC workshops been useful to you on your job?

Do you use the kit materials?

Do you find the workshop proceedings useful?

Any suggestions or comments for future workshops?

THANK YOU.

New LSCA guidelines require that all ongoing services of federal projects be evaluated by the users of the services. ("Include some means of assessing user opinion of the project.") North State Cooperative Library System and the Bay Area Reference Center would appreciate your remarks as users of the workshop program. Would you please fill in this questionnaire before leaving today.

EVALUATION OF MINI WORKSHOP
"GIVING BETTER REFERENCE SERVICE"

(When completing questions numbered 2, 3, 4 & 6, check as many answers as are relevant.)

1. In terms of meeting my objectives for attending, this workshop was:
_____more beneficial than expected, _____less beneficial than expected,
_____equal to expectations.

2. How do you think this workshop will help you in your work?
_____Help with reference interview _____More knowledge of certain reference books
_____More knowledge of local, state and federal documents.
Other:

3. Which parts of this workshop were most interesting and/or worthwhile for you?
_____Morning discussion of reference books _____Discussion of reference interview
_____Discussion of answering questions on local, state and federal government
_____Worksheet of reference questions
Other:

4. If parts of this workshop were of little or no value, please indicate which parts.
_____Morning discussion of reference books _____Discussion of reference interview
_____Discussion of answering questions on local, state and federal government
_____Worksheet of reference questions
Other:

5. What did you want to learn today that you did not learn?

6. How could this workshop be improved? _____Shorter _____Longer
More on: _____NSCLS _____BARC _____Reference interview _____Reference books
_____Government reference
Other:

7. I would be interested in future mini workshops on the following subjects:

1. 2.

3. 4.

8. Which reference books (ones not currently in the collection) would you like purchased for your branch library?

APPENDIX #15

EVALUATION FORM #1

Your assistance in answering these questions will be greatly appreciated. During the course of your enrollment with this project over the next six months, we will be asking you about certain aspects of the project. This information will enable us to better understand what has been accomplished and how future programs might be improved. Thank you very much for your cooperation.

David Forman

DATE: _____

1. What do you feel are the primary goals of the instructional development training seminar?

2. What do you hope to accomplish as a result of your involvement in the seminar?

3. What percentage of your time are you now teaching in a library or continuing education program?

   ( ) 75% to 100%
   ( ) 50% to 74%
   ( ) 25% to 49%
   ( ) Less than 25%

4. How much time did you spend preparing for this session?_____

5. Could you have used more time to prepare for this session? ( ) Yes ( ) No

   If so, please explain.

6. Has your college or university provided you with release time for six months following this session?

( ) Yes ( ) No ( ) Uncertain

If no, why not?

7. How much release time over the next six months have you been given to participate in this project?

( ) Over 75%
( ) 50% to 75%
( ) 25% to 49%
( ) 10% to 24%
( ) 1% to 9%
( ) None

8. How would you characterize the support for this project from your home campus?

( ) Enthusiastic
( ) Supportive
( ) Ambivalent
( ) Somewhat negative
( ) Very negative

9. Do you anticipate that you will have enough time to successfully develop and field test your module at your institution after the seminar?

( ) Yes ( ) No ( ) Uncertain

Please explain.

10. How would you rate the pre-seminar planning and information that you received about both the project as a whole and this particular training seminar?

( ) Excellent
( ) Good
( ) Average
( ) Poor
( ) Terrible

11. What suggestions could you make to improve planning and better prepare you for the seminar?

12. If needed, will you use consultants from your campus to assist in the development of media required for your module?

( ) Definitely yes
( ) Probably so
( ) Uncertain
( ) Probably not
( ) Definitely not

13. Will you be able to devote time and resources for field testing modules developed by your colleagues in <u>other</u> institutions?

( ) Definitely yes
( ) Probably so
( ) Uncertain
( ) Probably not
( ) Definitely not

14. Could you describe why you picked the module that you did and how you arrived at this decision.

15. To what extent did you survey existing material in making your choice of module?

( ) A great deal
( ) Somewhat
( ) Not too much
( ) Not at all

16. How do you feel about the possibilities for improving professional library science education by using instructional modules?

( ) Enthusiastic
( ) Positive
( ) Uncertain
( ) Somewhat negative
( ) Very negative

17. What does "instructional modules" mean to you and what do you feel are the advantages and disadvantages of using them?

18. What is your estimate of the extent to which you will be able to complete your module by Monday afternoon?

EVALUATION FORM #2

I again request your cooperation in completing the following questions.
Thank you.

David Forman

NAME: _____ DATE: _____

1. To what extent do you now feel confident in designing, producing and field testing an instructional module?

   ( ) Very confident
   ( ) Somewhat confident
   ( ) Not too confident
   ( ) Not confident at all

2. Overall, how would you rate the training seminar you have just completed?

   ( ) Excellent
   ( ) Good
   ( ) Average
   ( ) Poor
   ( ) Terrible

3. What did you particularly dislike about the seminar?

4. What did you particularly like about the seminar?

5. What suggestions can you make for the improvement of the training session?

6. Please rate the extent to which you feel each of the following sessions were effective.

| | Not Effective At All | Not Too Effective | Somewhat Effective | Very Effective |
|---|---|---|---|---|
| The Instructional Develop. Process | | | | |
| Field Trip (S.U. Approach) | | | | |
| Constructing a Prototype Module | | | | |
| Case Study (political Science) | | | | |
| Field Testing & Validation | | | | |

7. Overall, how would you rate the self-instruction and production laboratories?

( ) Excellent
( ) Good
( ) Average
( ) Poor
( ) Terrible

7. About how much work on your module did you complete in the laboratory sessions?

( ) Finished the module
( ) More than half
( ) Less than half
( ) Very little

8. Are you satisfied with the amount of work you have completed on your module?

( ) Yes
( ) Somewhat
( ) Not too much
( ) Not at all

Please explain.

9. Do you feel you are able to effectively identify, locate and order existing materials which relate to the subject of your module?

( ) Definitely yes
( ) Probably so
( ) Uncertain
( ) Probably not
( ) Definitely not

10. Do you anticipate that you will use some existing materials?

( ) Yes
( ) No
( ) Uncertain

11. Please indicate the steps that you have completed on your module at the training seminar.

Content selection
Objectives formulation
Entry behavior defined
Media selected
Content sequenced
Evaluation plan completed
(including field testing)

12. Please describe the work on the module that will be completed when you return home.

Content selection
Objectives formulation
Entry behavior defined
Media selected
Content sequenced
Evaluation plan
(including field testing)

13. Do you anticipate any problems in being able to complete your work on the module?

14. How do you feel about the possibilities for improving professional library science education by using instructional modules?

( ) Enthusiastic
( ) Postive
( ) Uncertain
( ) Somewhat negative
( ) Very negative

15. Have your attitudes about "instructional modules" changed as a result of the seminar? Please explain.